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FOREIGN CROPS AND MARKETS

ISSUED WEEKLY BY
THE FOREIGN AGRICULTURAL SERVICE
BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

THE WORLD SITUATION IN CATTLE AND BEEF

Reprint from issues of February 19 and 26, 1934

Prepared in the Foreign Agricultural Service Division and
Division of Statistical and Historical Research
Bureau of Agricultural Economics

February 26, 1934

THE WORLD SITUATION IN CATTLE AND BEEF a/

World cattle numbers in 1933 continued the upward trend of recent years, and current beef production is heavier than a year ago, according to information available in the Bureau of Agricultural Economics. Deficit countries, however, have tended to increase their restrictions on imports in the interest of domestic producers. Prices in protected markets are tending to go higher than a year ago, but in the leading export countries they show little if any improvement and continue at unusually low levels.

In the United States, a larger beef output is being sold at prices higher than early in 1933. Foreign cattle and fresh and frozen beef are entering in smaller quantities than last year, but there has been an increase in receipts of South American canned beef in recent months. The larger supplies of that item are a result of the efforts of Argentina, Uruguay and Brazil to find new markets for the supplies of frozen and chilled beef now being excluded from the usual European markets. Cattle and beef prices in South American are lower than those of a year earlier. Significant changes are pending in the organization of the cattle and beef industry in those countries, with governments taking a more active part in the interest of primary producers.

The movement of South American beef to Great Britain, the leading buyer, in 1934 will be limited more than in 1933 in view of the extension of Breat Britain of those phases of the Ottawa Agreement pertaining to beef. British Empire exporting countries will continue to enjoy an advantage over their South American competitors in the British market, but British domestic interest have secured limitations on cattle movements from Canada and the Irish Free State. Beef shipments from Australia are also subject to some limitations.

a/ Prepared in collaboration with Esther H. Johnson, Division of Statistical and Historical Research. The second part of this survey will appear in next week's issue, and both parts will be published together as a separate.

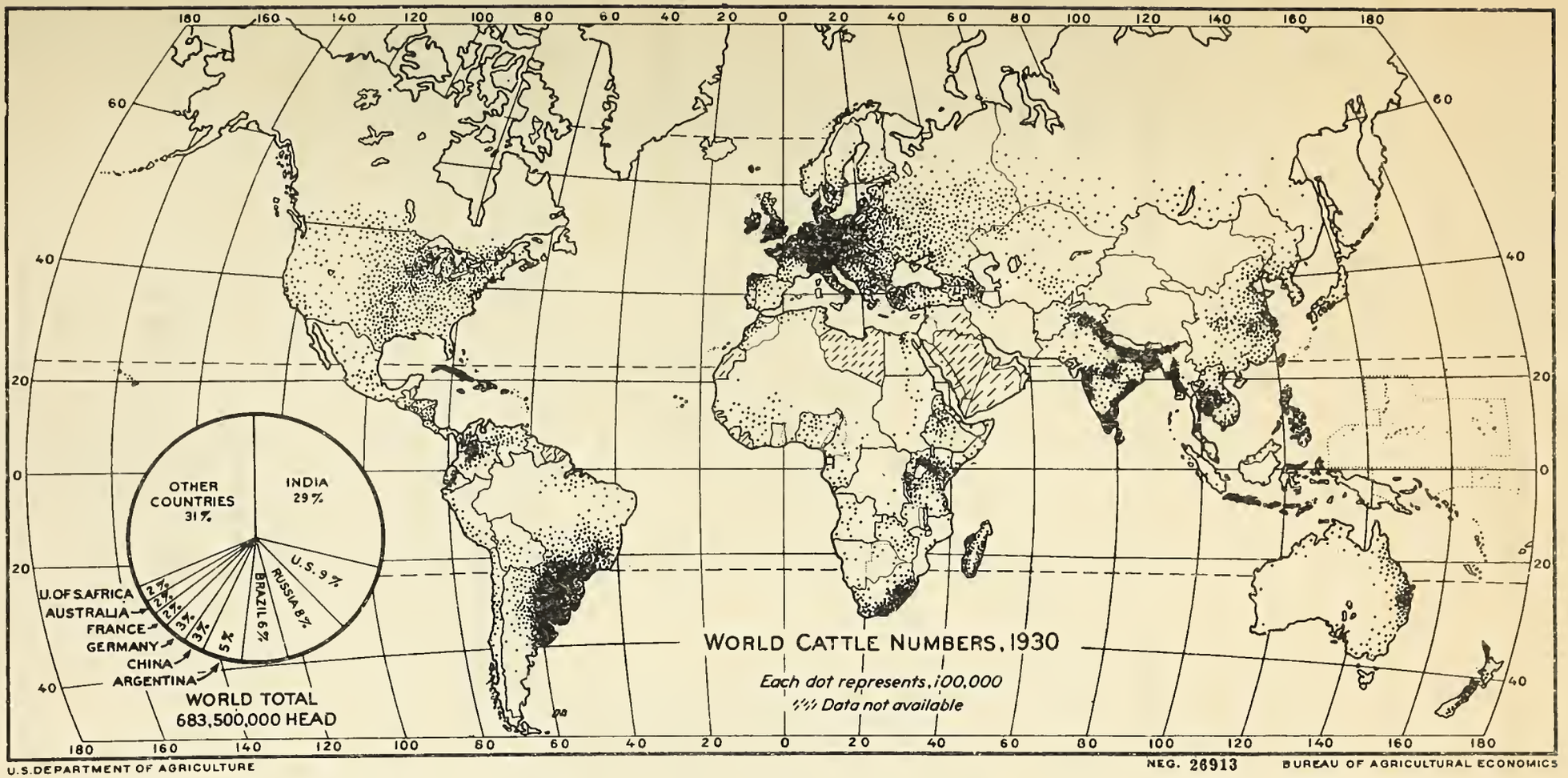

FIGURE 1 - THE CENTERS OF WORLD CATTLE PRODUCTION ARE IN THE UNITED STATES, THE LA PLATA RIVER BASIN OF ARGENTINA, URUGUAY AND SOUTHERN BRAZIL, EUROPE, SOUTH AFRICA, INDIA, CHINA, AND NORTHEASTERN AUSTRALIA. THE FIVE COUNTRIES, ARGENTINA, URUGUAY, BRAZIL, AUSTRALIA, NEW ZEALAND, WHICH SUPPORT A LITTLE OVER 1/6 OF THE WORLD'S CATTLE, ACCOUNTED FOR 90 PERCENT OF THE NET EXPORTS OF BEEF AND BEEF PRODUCTS IN 1930, WHEREAS THE UNITED KINGDOM, GERMANY, AND FRANCE CONSUMED 87 PERCENT OF THE NET IMPORTS.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

Ninety-four percent of the world's net export of beef comes from 7 a/ countries which support a little less than a fourth of the world's cattle. On the other hand 87 percent of the net imports are consumed by three countries, the United Kingdom, Germany, and France, which support only 6 percent of the world's total cattle numbers. See table, page 170.

While the United States is classed as an exporting country, both Canada and Mexico have regarded this country as a logical outlet for live cattle, and also for a certain amount of beef from Canada. In 1929, the year preceding the upward revision of the American import duties on live cattle, Canada and Mexico shared about equally in sending about half a million head of cattle, largely stocker and feeders, to the United States. In 1933 the trade was considerably smaller, with Mexico sending the larger number. The earlier Canadian participation in the small American import trade in fresh and frozen beef also has shrunk to insignificant proportions. The Canadian industry is being encouraged by a somewhat broader outlet in the British market.

The important South American export trade in beef is being forced to undergo a material readjustment as the result of trade restrictions set up by the important European importing countries, notably Great Britain. In the case of Argentina, the world's leading exporting country, new markets are being sought for a material portion of almost one-third of the national beef production heretofore prepared for export. Only a small proportion of Argentine beef comes to the United States in the form of canned beef, but that business was enlarged substantially in 1933. Both Uruguay and Brazil also are materially concerned with the British import limitations. On the other hand, Australia, New Zealand and the Union of South Africa are less hampered, although the current British policy is primarily in the interest of improving the prices paid for domestically produced beef.

Latest modifications of the Ottawa agreement affecting beef

It is reported that notwithstanding the efforts made since November 1932 to improve the situation on the wholesale meat market in the United Kingdom, the returns from the cattle feeding have continued unsatisfactory. Many British feeders have held back their stock from sale owing to the low level of prices while supplies from other sources pressed on the market. An effort is now being made to avoid a further price decline when the fat cattle held back last summer and autumn come on the market this spring.

Live cattle imports from Irish Free State up to March 30, 1934 are to be reduced 12½ percent below the corresponding period of 1933, the reduction in fat cattle imports being 50 percent. Canada is not to ship more cattle during the first quarter of 1934 than during the same period of 1933. The import of beef and veal including edible offal from Irish Free State is also prohibited

a/ Argentina, Uruguay, Australia, Netherlands, United States, New Zealand, Brazil.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

during this period. Arrangements are also being made to restrict the imports of foreign canned beef and other descriptions not specifically mentioned in the Ottawa agreement as well as to reduce the quotas for chilled and frozen beef during the first quarter of 1934.

The Ottawa agreement originally called for no reduction in the imports of foreign chilled beef as compared with the corresponding period of the Ottawa standard year a/, but the continued weakness of the market in the United Kingdom rendered it necessary to reduce imports in November and December, 1932 and to request a 10 percent reduction during the first quarter of 1933 b/. The new regulations call for a similar reduction in the first quarter of 1934.

Frozen beef, according to the Ottawa arrangements, was to be reduced 10 percent during the first quarter of 1933 compared with the corresponding quarter of the Ottawa year, the reduction to be increased 5 percent for each subsequent quarter so that in the second quarter of 1934 imports would be reduced to 65 percent of those in the corresponding period of the year ending June 30, 1932. The restriction did not apply to other descriptions of frozen beef, i.e. edible beef offal, but these have now also been limited.

World cattle numbers

The upward trend during the past four or five years resulted in the figures for 1933 being considerably larger than in either the 1921-1925 or 1926-1930 periods. The number in 20 countries c/ which support between 1/4 and 1/5 of the world total reached 157,000,000 in 1933, an increase of 2 percent above 1932. The increases were principally in the United States, Canada, the United Kingdom, France, and other western European countries and in New Zealand. Germany, Poland, and the Balkan countries showed decreases in 1933 as compared with 1932 but numbers in Germany were still considerably above the 1926-1930 average.

Some of the most important beef exporting countries, such as Argentina, Australia, and the Union of South Africa are not included in these totals owing to lack of recent estimates, but indications are that numbers have not decreased in those countries in recent years. Estimates for Brazil and Uruguay for 1932 show increases above 1930, the latest census year for most countries.

Cattle numbers in Argentina, the world's most important beef exporting country, up to the present, stood at 32,212,000 in June 1930, according to the latest census figures. Normally between 80 and 90 percent of the total beef exports from Argentina averaging over 1,000,000,000 pounds found a market in the United Kingdom. The recent modification of the Ottawa agreement restricting imports of foreign beef into the United Kingdom still further may be expected to affect the Argentina cattle industry materially. The number of cattle in Uruguay

a/ July 1931 to June 1932.
b/ Agricultural Market Report, July 38, 1933.
c/ See page 171 for details.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

the second largest beef exporting country, was estimated at 7,372,000 in 1932, an increase of 3 percent above the 1930 census figures. In Brazil, numbers in 1932 were officially estimated to be 6 percent above the unofficial estimates of packing house authorities for 1930 and 24 percent above the 1920 census figures.

Numbers in 39 countries in 1932, exclusive of Russia, are now estimated at 201,000,000, an increase of 3 percent above 1931, 5 percent above the 5-year average 1926-1930 and 3 percent above the average for 1921-1925. The latest estimates show that cattle numbers in Russia are declining, the number in 1933 having fallen as low as 38,600,000 a/, a decrease of 26 percent as compared with 1930 and over 40 percent as compared with the 1926-1930 average.

Beef production and per capita consumption

The increase in commercial slaughter of cattle and calves in 6 b/ important exporting countries during the first 9 or 11 months of 1933 was an advance of approximately 9 percent over comparable figures for the same periods of 1932. The increase in production in the same countries, however, amounted to 11 percent, indicating a heavier dressed weight per animal. The two principal importing countries, the United Kingdom and Germany, showed a reduction of about 4 percent during the 1933 period.

Judging from available trade figures, the reduced consumption of beef noted in the leading importing countries in 1932 was continued in 1933. Commercial production of beef and veal for 1932 in 11 c/ countries for which estimates are available amounted to approximately 15,220,000,000 pounds, a decrease of 2 percent as compared with 1931. There was a general decrease in the per capita consumption of beef and veal in 1932 in every country reporting except the United Kingdom, Argentina and Czechoslovakia. On the other hand, there was an increase in consumption of mutton and lamb. In practically every country beef consumption is now much lower than for the 5-year average 1921-1925. Germany and France are important exceptions. Although beef prices have declined materially, they are relatively higher than those for mutton, lamb and pork, a situation which undoubtedly has been a factor in the falling off of the per capita consumption of beef.

In 1932 increase in the per capita consumption of mutton and lamb was especially marked in New Zealand, Australia and the United Kingdom. There was an increase in pork consumption in Canada and the United States. European pork consuming countries, however, showed decreases in per capita consumption in 1932, the heaviest decrease of 4 pounds occurring

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a/ "Pravda", January 28, 1934. b/ United States, Argentina, Uruguay, Australia, Canada, Poland. c/ United States, Argentina, Uruguay, New Zealand, Canada, Poland, United Kingdom including Irish Free State, Germany, France, Norway, Czechoslovakia.

THE WORLD SITUATION IS CATTLE AND BEEF, CONT'D

in germany. Per capita consumption of all meats declined in that country in 193[illegible].

Per capita consumption of beef and veal in the United States declined in 1932, but there was an increase in per capita consumption of mutton, lamb, and pork. In New Zealand there was also a heavy decline in beef and veal per capita consumption in 1932-33, as a result of the increased consumption of mutton and lamb, due to the low level of prices of that kind of meat. On the other hand, there has been a heavy increase in beef per capita consumption in Argentina, as measured by figures for the Federal District of Buenos Aires, of over 5 pounds. In 1929, 1930 and preceding years, however, domestic consumption in Argentina was higher than at present. See tables, Pages 177 and 178.

CATTLE: Number in 10 countries most important in the international trade in beef and beef products, 1930 a/

	Number of Cattle in 1930	Beef and beef Products	
		Net Exports (-) 1930	Net Imports (+) 1930
	Thousands	Million Pounds	Million Pounds
Export countries			
Argentina	b/ 32,212	- 1,114	-
Uruguay	b/ 7,128	- 300	-
Brazil	42,539	- 227	-
Australia	12,202	- 224	-
New Zealand	3,766	- 103	-
United States	b/ 63,896	- 54	-
Netherlands	b/ 2,366	- 42	-
Total 7 Exporting Countries	164,109	- 2,064	-
Percentage of World Total	24	94	-
Import Countries			
United Kingdom	7,756	-	+ 1,612
Germany	18,033	-	+ 172
France	15,631	-	+ 61
Total 3 Importing Countries	41,420	-	+ 1,845
Percentage of World Total	6	-	87
Estimated World Cattle Numbers	683,481	-	-
Total Net Exports or Imports	-	- 2,187	+ 2,109

Compiled in the Division of Statistical and Historical Research. a/ includes fresh, pickled or salted, and canned beef; tallow, oleo oil, oleo stock, oleo stearin and oleomargarine. b/ Census.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CATTLE: Number in countries having 150,000 or over, average 1921-25, and 1926-1930, annual 1930-1933

Country	Month of estimate	Averages 1921-1925 a/	Averages 1926-1930 a/	1930	1931	1932	1933 Prel.
NORTH AND CENTRAL AMERICA AND WEST INDIES		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
United States...	Jan. 1	66,725	58,363	59,730	60,987	62,656	65,129
Canada	June	9,588	8,860	8,937	7,991	8,511	8,876
Mexico	June	b/ 2,492	c/ 4,660	d/ 3,735	- -		
Guatemala	July	268	397	416	387	369	
Honduras.....		e/ 466	517	517	- -		
Salvador		(340)	d/ (328)	d/ 328	- -		
Nicaragua.....		f/ 1,200	(1,200)	- -	- -		
Costa Rica.....		435	436	g/ 399			
Cuba	Jan. h/	4,841	4,496	4,845	4,339		4,448
Dom. Republic...	May	640	(488)	- -	- -		
Puerto Rico		279	311	d/ 311	- -		
All N. & C. American count. rept'd all per. to 1932		76,581	67,620	69,083	69,365	71,536	
Est. total i/.....		87,900	80,600				
SOUTH AMERICA							
Colombia.....		7,468	6,857	7,343	- -		
Venezuela.....		2,689	f/ 3,000	f/ 3,000	- -		
British Guiana...		117	148	155	181		
Ecuador.....		f/ 1,500	1,282	- -	- -		
Peru.....	Feb.	1,198	d/ 1,806	- -	- -		
Bolivia.....		2,145	1,918	2,050	2,064		
Chile.....		1,957	2,153	d/ 2,388	- -	d/2,388	
Brazil j/.....	Sept. d/	k/ 34,271	f/ 40,000	f/40,000	- -	42,539	
Uruguay.....		d/ 8,432	d/ 7,128	d/ 7,128	- -	7,372	
Paraguay.....	Jan. 1 h/	4,600	(4,500)	f/ 4,000	- -		
Argentina.....	Jan. 1	d/ 37,065	l/ 32,212	l/32,212	- -		
Est. total i/...		101,500	101,000				
EUROPE							
England & Wales..	June	5,824	6,072	5,850	6,065	6,358	6,621
Scotland	June	1,171	1,218	1,233	1,209	1,233	1,279
Northern Ireland.	June	748	695	673	681	715	733
Irish Free State.	June	4,266	4,059	4,038	4,029	4,025	4,137
Norway m/.....	June	1,128	1,221	1,251	1,310	1,342	
Sweden.....	June-July h/	k/ 2,736	2,980	3,060	3,109	3,120	
Denmark.....	July	2,613	2,981	3,057	3,208	3,237	3,141

Notes appear on page 174.

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THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CATTLE: Number in countries having 150,000 head or over, average 1921-1925 and 1926-1930, annual 1930-1933, cont'd

Country	Month of estimate	Average 1921-1925 a/	Average 1926-1930 a/	1930	1931	1932	1933 Prel.
EUROPE, CONT'D		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
Holland	May-June	d/ 2,063	d/ 2,366	d/ 2,366	-	-	2,877
Belgium	Jan. h/	1,550	1,719	1,738	1,759	1,76?	1,784
France	Jan. h/	13,582	14,886	15,631	15,467	15,434	15,643
Spain	Jan. h/	3,457	3,714	(3,657)	(3,655)	3,654	-
Portugal		797	d/ 853	-	-	-	-
Italy j/	(Mar.-Apr.)	6,812	d/ 7,108	d/ 7,108	-	-	-
Switzerland	Apr.	d/ 1,425	1,598	-	1,609	-	1,684
Germany	Jan. h/	16,786	17,776	18,033	18,470	19,124	19,139
Austria	Jan.-Apr.	2,241	d/ 2,313	d/ 2,313	-		
Czechoslovakia	Jan. h/	4,377	4,693	n/ 4,540	4,459	4,451	4,341
Hungary	Apr.	1,866	1,814	1,785	1,814	1,819	1,697
Yugoslavia j/	Jan. h/	4,204	3,749	3,765	3,850	3,912	3,851
Greece j/	Jan. h/	742	926	874	881	913	921
Bulgaria j/	Jan. h/	1,928	2,266	-	-	-	-
Rumania j/	Jan. h/	5,570	4,820	4,521	o/4,159	4,269	-
Poland	Nov.	8,063	l/ 9,019	l/ 9,400	l/9,786	l/ 9,461	l/8,982
Lithuania	Jan. h/	1,149	1,245	1,160	1,034	1,121	1,154
Latvia	June	867	977	1,026	1,117	1,153	-
Estonia	July	508	623	627	669	693	-
Finland	Sept.	1,847	1,841	1,810	1,822	1,806	-
Russia, Eur. & Asiatic		54,120	64,700	52,500	47,900	40,700	38,600
All Eur. Count. ex. Russia rept'd: all per. to 1932		83,054	87,028	87,729	88,553	89,607	
Est. total ex. Russia i/		98,400	103,700				
AFRICA							
Abyssinia		(4,000)	(4,000)				
Morocco		1,711	1,971	2,092	1,909	1,99?	
Algeria	Sept.	853	903	938	.872	893	896
Tunis	Jan. h/	459	464	498	.502	540	
French W. Africa		2,165	2,536	2,787	2,868	-	
French Sudan		1,086	1,025	1,139	1,400	-	
Nigeria(& Brit. Cameroons)		2,909	3,117	3,118	3,056	-	
Fr. Cameroon		354	412	504	519	-	
Egypt j/	Sept.	1,310	1,551	1,578	1,614	1,791	1,769
Anglo-Egypt Sudan		864	1,461	1,300	1,200	-	

Notes appear on page 174.

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THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CATTLE: Number in countries having 150,000 head or over, average 1921-1925 and 1926-1930, annual 1930-1933, cont'd

Country	Month of estimate	Average 1921-1925 a/	Average 1926-1930 a/	1930	1931	1932	1933 Prel.
AFRICA, CONT'D	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
Italian Somaliland.	Feb. d/	k/ 1,246	1,110	1,113		-	
Eritrea.....		553	d/ 749			-	
Kenya Colony.....	Mar.-June	3,038	3,812	5,193		-	
Uganda.....	Jan. h/	1,109	1,605	1,911	1,985	2,065	
French Eq. Africa..		815	1,278	1,456	f/1,504	-	
Belgian Congo.....		495	398	289	312	-	
Ruanda - Urundi....		700	816	940	-	-	
Angola - Portugese. West Africa.....		524	1,073	-	-	-	
Brit.Southwest Af..		561	643	655	465	-	
Bechuanaland.....		488	602	630	641	-	
Union of So. Africa	Aug.	9,459	10,640	10,751	-	-	
Basutoland.....		604	653	649	p/ 500	550	
Rhodesia... Northern.....	Jan. 1 h/	289	415	473	466	452	
Southern.....	Jan. 1 h/	1,794	2,268	2,398	2,468	2,582	2,756
Swaziland.....	Jan. 1 h/	244	316	380	334	372	
Tanganyika Territory		3,806	4,947	5,099	5,336		
Nyasaland.....	Mar. 31	120	151	171	175	-	
Mozambique (Port.E. Africa.....		342	446	491	571	-	
Madagascar.....	Feb.	7,708	7,038	7,048	-	-	
All Af. count. rpt'd all per. to 1932		8,373	10,146	10,910	10,650	11,235	
Est. total i/		50,000	56,900				
ASIA							
Turkey, Eur. & Asiatic j/.....		g/ 5,060	5,464	5,243	5,363	5,870	
Persia.....		f/ 1,000	(1,000)	-	664	-	
Syria and Lebanon.		257	300	391	426	-	
India j/- British.....	Dec. to Apr.	146,759	151,847	d/54,620	152,868	-	
Native States....		33,982	36,421	d/47,104	-	-	
Ceylon j/.....	Jan. 1 h/	1,459	1,570	1,650	1,660	1,580	
China, incl. Turk.. Man. & Inner Mon.		r/ 19,000	s/ 23,000	-	-	-	s/ 23,000
Japan.....	Jan. 1 h/	1,440	1,474	1,488	1,498	1,512	
Chosen.....	Jan. 1 h/	1,567	1,586	1,586	1,612	-	
Formosa j/.....	Jan. 1 h/	407	385	390	391	-	

Notes appear on page 174.

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THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CATTLE: Number in countries having 150,000 head or over, average 1921-1925 and 1926-1930, annual 1930-1933, cont'd

Country	Month of estimate	Average 1921-1925 a/	Average 1926-1930 a/	1930	1931	1932	1933 Prel.
ASIA, CONT'D		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
French Indo-China j/.....		3,600	3,896	3,919	3,913	-	
Siam j/.....	Mar.	6,701	8,783	9,153	9,513	-	
Philippine Is. j/	Jan. 1 h/	2,393	2,909	3,110	3,249	3,432	
Dutch East Ind.-							
Java & Madura j/	Jan. 1 h/	5,287	5,708	5,700	5,768	-	
Outer Posses. j/	Jan. 1 h/	1,872	1,994	2,049	2,064	-	
All As. count. excl. Russia rept'd all per. to 1932.....		10,352	11,417	11,491	11,770	12,394	
Est. total excl. Russia i/		232,600	248,200				
OCEANIA							
Australia.....	Jan. 1 h/	13,789	11,873	11,202	11,721	12,260	
New Zealand....	Jan.	3,393	3,439	3,766	4,081	4,072	4,182
All Oceania count. rept'd all per. to 1932.....		17,182	15,313	14,968	15,802	16,332	
Est. total i/.		17,400	15,500				
Total count. rept'd all per to 1932 (39)T		195,542	191,593	194,181	196,140	201,104	
To 1933 (20)T		150,604	146,236	149,118	150,725	154,076	157,031
Est. world total incl. Russia i/ u/..		641,900	670,600				

Division of Statistical and Historical Research, Bureau of Agricultural Economics. Compiled from reports from United States Department of Agricultural representatives abroad, official sources and the International Institute of Agriculture unless otherwise stated. Figures in parenthesis interpolated. a/ Average for five year period, if available, otherwise for any year or years within this period except as otherwise stated. b/ Incomplete. c/ Average of 1926 estimate for 96% of the municipalities and 1930 census. d/ Census. e/ Year 1918. f/ Unofficial. g/ Year 1929. h/ Countries reporting as of December have been considered as of January 1 of following year. i/ This total includes interpolations for a few countries not reporting each year and rought estimates for some others. j/ Buffaloes include. k/ Year 1920. l/ Census June. m/ In rural communities only. n/ Preliminary census figures for May 27.

Continued -

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

o/ Estimate of total number based on number in rural communities only as compared with last year. p/ Estimate by Basutoland Government Agricultural Official on the presumption that previous estimates are too high. q/ Includes unofficial estimate of 670,000 buffaloes. r/ Estimate based on official figures for 1920 for 20 provinces which supported 63% of the cattle in China in 1914. No data available in 1920 for such important provinces as Hupeh with 1,898,000 in 1914, Hunan with 2,192,000, Szechuan with 3,009,114, Kwantung with 2,298,000 and Kwangsi with 1,527,000. s/ Estimate for China based on official figures in 1932 or 1933 for 22 provinces which supported 98% of total in 1914. Official estimate excluding Turkestan and Inner Mongolia was 22,333,000 in 1932 or 1933. Some of this territory has now been incorporated into Manchukuo but it is not included elsewhere in this table. t/ Comparable totals. Russia excluded. u/ Estimated totals for continents are as follows in millions of head for 1909-1913. North and Central America and West Indies, 74.9; South America, 80.3; Europe, excluding Russia, 103.3; Africa, 33.8; Asia, excluding Russia 195.3; Oceania, 13.8; World 562.0.

CATTLE AND CALVES: Estimated slaughter in exporting and importing countries, average pre-war, years 1929 to 1932 and latest months, 1933 with comparisons

(For earlier figures see Foreign Crops and Markets, Sept. 21, 1931 and Jan.23,1933)

Country	Average pre-war	1929	1930	1931	1932 Prel.	From beginning of year to latest date available	
						1932	1933
EXPORTING COUNTRIES a/	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.
United States:							
Inspected.....	9,632	12,813	12,765	12,825	12,119	b/11,223	b/12,440
Total.....	18,907	20,554	20,700	20,948			
Argentina:							
In freezing est.only.	1,154	2,792	2,679	2,297	2,214	c/ 1,843	c/ 1,949
In packing plants and Liniers.....	2,132	3,932	3,776	3,361	3,209	b/ 2,801	b/ 2,979
Total(excl. farm) d/.	3,272	6,138	5,966	5,383	e/ 5,275	-	-
Uruguay:							
In freezing works ..	59	853	1,108	901	754	b/ 695	b/ 752
Total excl. farm....	914	1,375	1,285	1,102	916	-	-
Australia, total.....	1,572	1,947	1,787	1,751	-	-	-
For export only.....	-	471	429	425	397	c/ 343	c/ 450
Netherlands:							
Inspected.....	-	1,321	998	1,053	-	-	-
New Zealand g/	277	h/ 811	h/ 894	h/ 938	h/i/ 933	-	-
Brazil, total.....	1,680	-	-	i/ 4,800	-	-	-
In packing plants:							
State of Sao Paulo	-	538	523	457	-	-	-
State of Rio Grande do Sul.....	708	815	837	626	-	-	-

Notes appear on next page.

Continued.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CATTLE AND CALVES: Estimated slaughter in exporting and importing countries, average pre-war, years 1929 to 1932 and latest months, 1933 with comparisons, cont'd

(For earlier figures see Foreign Crops and Markets, Sept. 21, 1931 and Jan. 23, 1933)

Country	Average pre-war	1929	1930	1931	1932 Prel.	From beginning of year to latest date available	
						1932	1933
EXPORTING COUNTRIES a/	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.
Canada:							
Inspected	452	1,117	978	963	937	b/ 877	b/1,025
Total	1,218	1,953	1,904	1,702	1,669	-	-
Union of South Africa j/	-	624	i/ 569	-	-	-	-
At principal abattoirs	-	500	387	353	328	f/ 235	f/ 304
Poland:							
Inspected.....	-	3,221	3,372	3,655	3,597	k/2,050	k/2,005
Total.....	-	3,366	3,475	3,796	3,782	k/2,175	k/2,104
IMPORTING COUNTRIES							
United Kingdom l/	2,361	3,572	3,350	3,234	3,461		
Germany:							
Inspected.....	6,929	8,721	7,638	7,468	7,939	f/6,009	f/5,838
Inspected and farm..	7,057	8,769	7,687	7,516	i/7,988	-	-
France, total m/.....	5,813	5,333	6,367	6,419	6,208	-	-
Belgium:							
Inspected and farm..	758	853	718	618	-	-	-
Norway.....	327	409	377	370	411	-	-
Czechoslovakia	-	1,801	1,619	1,744	1,810	-	-

Division of Statistical and Historical Research.

Later figures if any appear in the text. Countries arranged in order of importance as exporting and importing countries of beef and beef products except that the United States, has been placed first for convenience.

a/ Exports of beef and veal products usually exceed imports.

b/ First 11 months of year.

c/ First 10 months of year.

d/ Farm slaughter roughly estimated at 1,000,000 head annually according to Assistant Agricultural Commissioner, C. L. Luedtke.

e/ Estimated on basis of decrease in packing plants and Liniers market.

f/ First 9 months of year.

g/ Season beginning April 1.

h/ Includes farm slaughter years February 1, 1929, 7,705; 1930, 8,635; 1931, 22,095.

i/ Unofficial estimate.

j/ Year beginning July 1 - Slaughter at all abattoirs and slaughter poles.

k/ First half.

l/ Years beginning June 1. Including Irish Free State. Postwar estimates based on official method of estimating production in England and Wales.

m/ For method of estimating see United States Department of Agriculture Technical Bulletin #37, Agricultural Survey of Europe, France, by Dr. L. G. Michael, p. 126 & 127.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

BEEF AND VEAL: Estimated production in exporting and importing countries, average pre-war, years 1929 to 1932, and latest months, 1933 with comparisons

(For earlier figures see Foreign Crops and Markets, September 21, 1931 and January 23, 1933)

Country	Average pre-war	1929	1930	1931	1932 Prel.	From beginning of year to latest date available 1932	1933
EXPORTING COUNTRIES a/	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States:							
Inspected.....	4,084	4,728	4,704	4,751	4,394	b/ 4,062	b/ 4,618
Total.....	6,983	6,881	6,909	6,992	-	-	-
Argentina:							
In freez. works..	818	1,612	1,558	1,423	1,411	c/ 1,165	c/ 1,203
In packing plants and Liniers d/.	1,512	2,269	2,194	2,022	2,047	b/ 1,771	b/ 1,838
Total (excl. farm) d/	2,312	3,881	3,466	3,337	3,365	-	-
Uruguay:							
In freez. works d/	32	348	476	365	305	e/ 251	e/ 267
Total (excl. farm) d/	469	561	553	446	371	-	-
Australia f/	764	833	771	755	g/	c/d/ 148	c/d/ 194
New Zealand h/.....	221	i/ 310	i/ 301	i/ 304	i/ 302	j/ 56	j/ 87
Brazil, total	809	-	-	2,116	-	-	-
State of Sao Paulo	-	323	314	274	-	-	-
Canada:							
Inspected d/.....	140	396	347	342	333	b/ 311	b/ 364
Total.....	426	693	676	604	593	-	-
Poland, inspected k/	-	508	504	524	585	l/ 284	l/ 286
Total k/.....	-	525	515	537	605	l/ 295	l/ 295
IMPORTING COUNTRIES							
United Kingdom d/m/	1,714	1,625	1,594	1,515	1,597	b/n/ 74	b/n/ 75
Germany:							
Inspected.....	2,104	2,571	2,385	2,345	2,405	e/ 1,803	e/ 1,739
Total	2,139	2,581	2,395	2,355	2,414	e/ 1,810	e/ 1,746
France	2,040	1,807	1,962	2,129	2,029	e/ 1,810	e/ 1,746
Belgium	316	282	255	240	-	-	-
Norway:							
Inspected	51	63	59	62	69	-	-
Total.....	-	o/ 85	-	o/ 91	-	-	-
Czechoslovakia	-	501	466	463	481	-	-

Division of Statistical and Historical Research

Compiled from official sources unless otherwise stated. Edible offal not included for the United States. Assumed that it is not included for other countries unless specifically stated. Later figures, if any, appear in the text. Coun-

Continued.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

BEEF AND VEAL: Estimated production in exporting and importing countries, average pre-war, years 1929 to 1932, and latest months, 1932 with comparisons, cont'd

NOTES, CONT'D
tries arranged in order of importance as beef exporting and importing countries with the exception of the United States, which has been placed first for convenience. a/ Countries in which exports usually exceed imports. b/ First 11 months of calendar year. c/ First 10 months of calendar year. d/ Estimated by multiplying slaughter by an ascertained average dressed weight. e/ First 9 months of calendar year. f/ Average production pre-war for 10 years ended 1920-21, for subsequent seasons 1 year only. g/ Exports of frozen beef reached 142 million pounds in 1932 compared with 165 million pounds in 1931. h/ Season beginning April 1. i/ Includes farm production. j/ Exports first 8 months of calendar year. k/ Estimates for 1932 and subsequent period based on study made recently and published by the Polish Central Statistical Office entitled Regions d'Elevage, Production et Consommation de la Viande en Pologne, in which production was given for 1929-1931. These figures are considerably lower than those used in former issues of Foreign Crops and Markets based on an average dressed weight officially reported for 1927. l/First 6 months of calendar year. m/ Incl.Irish Free State 1. n/Receipts of home produced meat at London Central Markets. (o) Census.

MEAT: Estimated per capita consumption of beef, mutton and pork in specified countries, pre-war, and 1921-1925 averages, annual 1929-1932

(For earlier figures see Foreign Crops and Markets, for January 23, 1933, September 21, 1931 and July 21, 1930, pages 82-84)

Country and year	Beef and veal	Mutton and lamb	Pork and lard	Total
EXPORTING COUNTRIES a/	Pounds	Pounds	Pounds	Pounds
United States: b/				
Pre-war	73.5	7.3	72.7	153.5
Average 1921-1925	68.3	5.3	83.2	156.8
1929	58.2	5.8	87.1	151.1
1930	56.9	6.6	83.1	146.6
1931	56.5	7.1	84.0	147.6
1932 c/				
Argentina: (Fed. Dist.)				
Pre-war	254.9	32.2	15.1	302.2
Average 1921-1925	274.9	24.5	25.8	325.2
1929	251.2	21.7	30.8	303.7
1930	242.1	24.4	32.6	299.1
1931	208.4	21.7	34.8	264.9
1932	213.6	23.9	35.7	273.2

Notes appear on page 181.

Continued -

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

MEAT: Estimated per capita consumption of beef, mutton and pork in specified countries, pre-war, and 1921-1925 averages, annual 1929-32, cont'd

(For earlier figures see Foreign Crops and Markets, for January 23, 1933, September 21, 1931 and July 21, 1930, pages 82-84)

Country and year	Beef and veal	Mutton and lamb	Pork and lard	Total
EXPORTING COUNTRIES a/	Pounds	Pounds	Pounds	Pounds
Australia: d/				
New South Wales -				
Pre-war	152.3	97.5	14.4	264.2
Average 1921-1925	122.5	68.6	15.1	206.2
1929	99.6	73.3	16.9	189.8
1930	90.2	83.0	15.3	188.5
1931				
1932				
Netherlands:				
Pre-war	34.2			
Average 1921-1925	40.7			
1929	42.6			
1930	39.8			
1931	34.9			
1932				
New Zealand: e/				
Average 1921-1925	f/175.9	92.1	30.5	298.5
1929	174.0	86.9	28.4	289.3
1930	168.0	77.3	26.3	271.6
1931 g/	170.0	110.4	26.7	307.1
1932 g/	149.0	115.8	24.7	289.5
Canada: h/				
Pre-war	60.9	9.1	66.7	136.7
Average 1921-1925	70.8	8.0	78.4	159.2
1929	66.6	6.9	79.7	153.2
1930	65.8	6.9	72.9	145.6
1931	57.9	7.0	83.5	148.4
1932	56.0	7.0	91.8	154.8
IMPORTING COUNTRIES				
United Kingdom: i/				
Pre-war	61.3	29.3	33.8	124.4
Average 1921-1925	62.2	24.3	39.4	125.9
1929	d/ 60.9	d/ 26.7	d/ 37.4	d/ 125.0
1930	d/ 60.3	d/ 26.9	d/ 41.7	d/ 128.9
1931	d/ 58.1	d/ 28.7	d/ 47.7	d/ 134.5
1932 g/	d/ 59.0	d/ 31.0	d/ 46.7	d/ 136.7

Notes appear on page 182

Continued -

Foreign Crops and Markets

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

MEAT: Estimated per capita consumption of beef, mutton and pork in specified countries, pre-war, and 1921-1925 averages, annual 1928-1932 cont'd

(For earlier figures see Foreign Crops and Markets, for January 23, 1833, September 21, 1931 and July 21, 1930, pages 82-84.

Country and year	Beef and veal	Mutton and lamb	Pork and lard	Total
Importing countries:	Pounds	Pounds	Pounds	Pounds
Germany: j/k/				
Pre war	40.6	2.0	73.1	115.7
Average 1921-1925	31.6	2.0	58.2	96.3
1929	44.0	1.5	70.9	116.4
1930	39.9	1.6	71.9	113.4
1931	41.7	1.5	76.1	119.3
1932 g/	38.3	1.4	71.8	111.5
France: l/				
Pre war	49.2	9.5	47.0	105.7
Average 1921-1925	48.0	6.9	37.8	92.7
1929	44.3	6.8	36.5	87.7
1930	48.9	7.7	38.9	95.5
1931	54.6	7.5	40.9	103.0
1932 g/	49.9	6.6	38.7	95.2
Belgium:				
Pre war	41.6	2.0	42.2	85.8
Average 1921-1925	43.5	1.0	32.3	76.8
1929	41.5	1.5	36.0	79.0
1930	39.0	1.3	41.9	82.2
1931	39.0	1.3	48.8	89.1
1932				
Czechoslovakia: m/				
Pre war		-	-	-
Average 1921-1925	27.2	6.6	32.6	66.4
1929	32.2	7.7	39.7	79.6
1930	28.5	7.3	40.4	76.2
1931	27.4	8.2	41.8	77.4
1932	28.7	7.5	36.2	72.4

Division of Statistical and Historical Research.

Compiled from official sources unless otherwise stated. In some cases the figures in this table differ from those in other issues of "Foreign Crops and Markets". The changes are due mostly to the receipt of additional information after the publishing of those issues. In cases where per capita consumption has been estimated by adding to estimated production net imports or subtracting net exports the classification used in the international trade tables for beef and beef products, pork and pork products and mutton as published in the Yearbooks of the United States Department of Agriculture has been used.

Edible offal not included for the United States and not included for other countries unless specifically stated.

Notes appear on next page. Continued:--

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

MEAT: Estimated per capita consumption of beef, mutton and pork in specified countries, pre-war, and 1921-1925 averages, annual 1928-1932, Cont'd

NOTES, CONT'D:

a/ Countries in which exports usually exceed imports. Arranged in order of importance as beef exporting countries except that the United States has been placed first for convenience.

b/ Estimates of the Division of Livestock, Meats and Wool. Lard is included to make estimates more comparable with those for other countries. Lard consumption alone in 1931 was 14.4 pounds.

c/ Total per capita consumption not available for 1932. Per capita consumption of Federally inspected alone was as follows in pounds: Beef and veal 1931, 38.5; 1932, 35.4; mutton and lamb 1931, 7.9; 1932, 8.2; Pork incl. lard, 1931, 56.9; 1932, 58.1.

d/ Season beginning July 1. Average for all Australia is officially estimated as follows in pounds; Beef and veal for 7 years ended 1920-21, 109.68; 1929-30, 104.86; 1930-31, 94.46; Mutton and lamb 7 years ended 1920-21, 69.47; 1929-30, 78.60; 1930-31, 76.52; Bacon and hams, 1921-1925, 11.22; 1929-30, 10.73; 1930-31, 10.65.

e/ Season beginning April 1. Three-year averages ended year indicated. For pork and beef and veal estimates are based on annual consumption figures divided by population.

f/ Beef per capita consumption only, i.e., veal not included - comparable figures for later years were as follows in pounds: 1929-30, --- ; 1930-31, 146.28.

g/ Preliminary.

h/ Lard not included with pork on account of lack of estimates.

i/ For season beginning June 1 including Irish Free State. Official estimates of pork per capita consumption apparently exclude imported lard. Including imported lard unofficial estimates are as follows in pounds: Average, 1909-13, 37.9; Av. 1921-1925, 44.9; 1929, 42.9; 1930, 47.6; 1931, 53.4; 1932, 52.2.

j/ Official estimates for years 1929-1932. Others obtained by adding net imports as compiled from the United States Department of Agriculture international trade tables to estimated production and dividing by population.

k/ Includes imported edible offal; excluding imported edible offal the figures were as follows in pounds: Beef and veal, average 1909-13, 36.6; average 1924-1925, 35.8; 1929, 42.9; 1930, 40.0; 1931, 36.5; 1932, 37.2. Pork and lard, average 1909-13, 68.6; average 1921-1925, 53.9; 1929, 67.5; 1930, 69.0; 1931, 73.2; 1932, 68.1. Lard per capita consumption is estimated as follows: 1913, 7.56; 1925, 6.75; 1929, 7.23; 1930, 6.79; 1931, 7.10; 1932, 7.63.

l/ Figures for beef, and mutton are estimates of Dr. Louis G. Michael, Foreign Agricultural Service Division up to 1925 inclusive. Estimates for subsequent years based on same method of estimating. Pork per capita consumption estimated by adding net imports to production and dividing by population.

m/ Figures for per capita consumption of "all other meats" have been placed in mutton and lamb column. Lard consumption was as follows in pounds: Average 1922-1925, 12.6; 1929, 12.8; 1930, 12.3; 1931, 11.5; 1932, 10.2.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

United States

The upward tendency in cattle prices in the United States since December 1, 1933 is contrary to the usual seasonal tendency. By early February, medium beef steers were bringing about 14 percent more money at Chicago than they were a year earlier. The average price of such steers, all weights, for the week ended February 3 was $5,33 per 100 pounds against $4.66 for the corresponding 1933 period. The average for that class of steers for the calendar year 1933 was $4.84, representing the lowest annual average reached in the downward price movement of the past 5 years. Prices of feeder cattle, however, continue to run behind those of last year, largely because of higher prices for corn and other feed. Current cattle receipts have a tendency to run larger than a year ago. Some support to the market has been afforded by government purchases for relief purposes. Beef prices at Chicago also have tended to go above last year's levels.

Receipts of cattle at seven leading markets during December 1933 was 12 percent larger than in December 1932, but were 13 percent smaller than the 5-year average for December. Inspected slaughter of cattle in December totaling 721,000 head was 27 percent larger than in December a year earlier, and was the largest for the month since 1927. The proportion of heavy well finished cattle in the slaughter supplies continued unusually large. The total number of slaughter steers of choice-and-prime and good grades at Chicago during December was the largest for the month in the 12 years that records are available, and the proportion that these two grades constituted of the total number of slaughter steers was much the largest for the month on record. Inspected slaughter of calves in December, although slightly smaller than in November, was the largest for the month since 1927.

Cattle slaughter under Federal inspection for the entire year of 1933 amounted to 8,655,000 head, which was about 1,000,000 head or 14 percent larger than in 1932, and was the largest yearly total since 1927. Calf slaughter during 1932 totaled 4,907,000 head, the largest since 1926. The year just ended is the first since 1926 in which cattle slaughter has exceeded that of the preceding year. This relatively large increase in the slaughter of cattle and calves last year is to a considerable extent the result of the increase in numbers of cattle on farms and ranges which has been underway since 1928. Shipments of stocker and feeder cattle from the leading markets in December were somewhat smaller than in December 1932, and were much the smallest for the month in other recent years.

The further reductions during 1933 in the usually small American import trade in fresh and frozen beef resulted in a total figure less than half the size of the 1932 total. Of the current figure, New Zealand supplied 52.9 percent, with 42.0 percent coming from Canada. The small import trade with Cuba registered in 1932 disappeared in 1933, while imports from Australia dropped to less than 20,000 pounds. About 1,000,000 pounds of pickled beef

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

were imported in 1933, 58.9 percent coming from Uruguay. In canned beef, however, the 1933 imports of about 43,000,000 pounds represented an increase over 1932 of about 95 percent, and represented the heaviest imports of that item since 1930, according to the records of port inspections made by the Bureau of Animal Industry. Practically all of such shipments are received from South America, principally Argentina.

With live cattle imports into the United States in 1933 down to 80,000 head, that trade was 24.3 percent smaller than in 1932 and below the level of other recent years. Feeder cattle from Mexico continue to represent the bulk of the business, accounting for 91 percent of the 1933 total. In other years, similar animals from Canada comprised the next largest item. In 1932 and 1933, however, that position was taken by Canadian breeding stock entering duty free. The import duty schedules made effective in 1930 on beef and cattle entering the United States have not been altered.

The slight increase in the American export trade in beef and veal in 1933 resulted in a total for the year 34.4 percent larger than the 1932 total, and also slightly above the 1931 total. In none of the past four years, however, has the trade accounted for as much as 19,500,000 pounds. Fully half of the fresh, canned, pickled and cured beef comprising the total exports of last year was represented by exports of pickled beef to Newfoundland and Labrador. Fresh beef to Canada and canned beef to the United Kingdom were the other outstanding items in the 1933 beef export trade.

UNITED STATES: Average monthly price per 100 pounds of medium beef steers, all weights, sold out of first hands at Chicago for slaughter

Month	1929	1930	1931	1932	1933
	Dollars	Dollars	Dollars	Dollars	Dollars
Jan.	12.16	11.68	8.72	6.04	4.43
Feb.	11.48	11.96	7.91	6.00	4.66
Mar.	12.26	11.88	7.97	6.06	4.89
Apr.	12.93	11.23	7.46	6.15	4.64
May	12.99	10.78	7.05	5.59	5.21
June	13.38	10.13	6.95	6.17	5.24
July	13.13	8.72	7.01	7.06	5.32
Aug.	12.41	8.71	7.52	6.94	5.19
Sept.....	12.32	9.39	6.82	6.88	5.19
Oct.	12.25	9.09	6.94	5.90	4.62
Nov.	11.78	9.20	6.99	5.38	4.32
Dec.	11.79	9.13	6.18	4.63	4.43
Average.	12.32	10.39	7.39	5.98	4.84

Division of Statistical and Historical Research. Compiled from records of the Market Reporting Service of the Division of Livestock, Meat and Wool.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

UNITED STATES: Tariff rates on cattle and beef, Acts of 1922 and 1930

Item	Tariff Act of 1922		Tariff Act of 1930	
	Par	Rate of duty	Par	Rate of duty
Cattle (except for breeding):				
Weighing less than 700 lbs. each	701	a/ 1½¢ per lb.	701	2½¢ per lb.
Weighing 700 lbs. or more each..	701	b/ 2¢ " "	701	3¢ " "
Beef and veal, fresh, chilled or frozen	701	3¢ " "	701	6¢ " "
Prepared or preserved meat not specially provided for (includes canned beef).....	706	20% ad val.	706	6¢ per lb. but not less than 20% ad valorem

a/ Weighing less than 1,050 pounds each. b/ Weighing 1,050 pounds or over.

UNITED STATES: Beef and veal imports by countries, 1914, 1930-1933

Commodity and country from which imported	Year ended December 31				
	1914 a/	1930	1931	1932	1933
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
FRESH AND FROZEN:					
Canada	15,920	3,226	417	435	159
Cuba	0	1,869	126	161	0
Argentina	59,775	4	0	0	0
Uruguay	25,903	60	0	0	0
Australia	19,859	1,584	35	21	19
New Zealand	859	2,763	1,278	265	200
Other countries..	57,821	7	1	0	0
Total	180,137	9,513	1,857	882	378
PICKLED OR CURED b/					
Canada		376	42	31	7
Argentina		1,253	217	56	c/
Uruguay		468	1,137	722	611
Other countries		4	69	5	40
Total		2,101	1,465	814	658
TOTAL BEEF & VEAL d/	180,137	11,614	3,322	1,696	1,036

Foreign Agricultural Service. Compiled from Foreign Commerce and Navigation of the United States, 1914, 1929-1932, and official records of the Bureau of Foreign and Domestic Commerce. a/ Year ended June 30, first full year available by countries. b/ Not separately reported prior to 1928. c/ Less than 500. d/ Excludes imports of canned beef and veal.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

UNITED STATES: Inspection of canned beef and veal from foreign countries at ports of entry, 1921-1933

Year ended December 31	Beef, canned	Veal, canned	Total
	Pounds	Pounds	Pounds
1921	309,964	2,676	312,640
1922	440,265	0	440,265
1923	4,278,389	0	4,278,389
1924	7,321,240	1,445	7,322,685
1925	7,974,639	3,836	7,978,475
1926	22,280,693	764	22,281,457
1927	33,892,403	2,920	33,895,323
1928	50,680,459	36	50,680,495
1929	77,480,904	48	77,480,952
1930	48,533,169	312	48,533,481
1931	18,119,531	1,222	18,120,753
1932	21,853,683	481	21,854,164
1933	43,182,728	1,632	43,184,360

Foreign Agricultural Service. Compiled from records of inspections, Bureau of Animal Industry.

UNITED STATES: Imports of cattle by countries, average 1909-1913, annual 1930-1933

Country from which imported	Year ended December 31				
	Av. 1909-1913 a/	1930	1931	1932	1933
FREE:	Number	Number	Number	Number	Number
United Kingdom	1,475	536	286	169	63
Canada	379	3,488	6,505	6,769	4,957
Mexico	463	1,455	862	638	299
Other countries	7	2,421	2,232	0	1
Total	2,324	7,900	9,885	7,576	5,320
DUTIABLE:					
United Kingdom	27	6	3	0	0
Canada	9,544	55,308	19,584	5,994	1,370
Mexico	239,716	170,959	65,883	90,409	73,288
Other countries	3	0	0	1,633	0
Total	249,290	226,273	85,470	98,036	74,658
Total cattle..	251,614	234,173	95,355	105,612	79,978

Foreign Agricultural Service. Compiled from Foreign Commerce and Navigation of the United States, 1913, 1930-1932 and official records of the Bureau of Foreign and Domestic Commerce. a/ Year ended June 30.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

UNITED STATES: Exports of beef and veal by countries, average 1909-10 to 1913-14, annual 1930-1933.

Commodity and country to which exported	Year ended June 30	Year ended December 31			
	Av. 1909-10 to 1913-14	1930	1931	1932	1933
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
FRESH:					
United Kingdom	23,410	782	192	1	73
Canada	373	113	56	6	2
Panama	5,027	108	384	529	1,039
Mexico	11	490	372	267	247
Bermudas	399	221	433	321	328
British W. Indies	115	238	196	89	105
Netherlands W. Indies	a/	337	280	314	384
Newfoundland & Labrador	8	190	12	2	0
Other countries	109	374	158	104	722
Total	29,452	2,853	2,083	1,633	2,900
CANNED:					
United Kingdom	5,129	1,096	1,018	729	851
Belgium	307	a/	2	a/	a/
Netherlands	212	1	a/	0	0
France	114	6	4	a/	2
Canada	109	52	61	13	22
British S. Africa	621	34	27	22	32
Portuguese Africa	263	5	5	4	9
Philippine Islands	436	101	76	59	52
Panama	351	18	10	13	18
Mexico	174	31	11	7	28
British Honduras	116	8	9	10	20
Cuba	174	8	2	a/	a/
British West Indies	177	47	35	8	16
Netherland W. Indies	23	35	39	35	27
Peru	140	1	2	1	1
Newfoundland & Labrador	111	86	30	35	42
Other countries	935	181	157	67	82
Total	9,392	1,710	1,478	1,003	1,202
PICKLED AND OTHER CURED b/					
United Kingdom	7,902	415	265	106	223
Germany	3,618	343	234	192	243
Norway	1,434	1,206	358	320	474
Belgium	1,350	34	44	14	23
Netherlands	583	9	128	0	6
Denmark	476	2	0	0	0
Newfoundland & Labrador	4,942	8,753	8,066	6,862	8,520

Continued -

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

UNITED STATES: Exports of beef and veal by countries, average 1909-10 to 1913-14, annual, 1930-1933, Cont'd.

Commodity and country to which exported	Year ended June 30	Year ended December 31			
	Av.1909-10 to 1913-14.	1930	1931	1932	1933
PICKLED AND OTHER CURED, b/ - Cont'd:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Canada	1,386	810	416	115	142
Panama	1,070	105	170	45	57
Haiti, Republic of	537	91	53	28	21
British W. Indies	3,057	542	398	160	559
French W. Indies	282	498	1,362	1,339	1,586
Netherland W. Indies	152	369	367	303	225
Surinam	1,486	316	131	51	114
British Guiana	1,210	13	13	2	62
Other Countries	3,325	1,165	1,007	331	479
Total	32,810	14,671	13,022	9,868	12,734
TOTAL BEEF AND VEAL	71,654	19,234	16,583	12,504	16,836

Foreign Agricultural Service. Compiled from Foreign Commerce and Navigation of the United States, 1914, 1930-1932, and official records of the Bureau of Foreign and Domestic Commerce. a/ Less than 500. b/ Includes "Beef, pickled," only prior to 1911.

Canada

Inspected slaughter of cattle and calves in Canada for the year 1933 exceeded those of 1932 by 17 percent. Slaughter of cattle amounted to 654,000 and was 18 percent above the preceding year. The number of calves killed sold were 438,000, an increase of 14 percent. The outlook for 1934 is for abundant supplies, states the monthly Canadian Government Livestock Report, with a very moderate percentage of winter fed cattle. The tendency is to carry over lighter weights for finishing on grass in the spring. The supply of calves is expected to be normal. The number marketed in 1932 was the smallest in years. Prices reached new low levels during 1933 but strengthened somewhat toward the end of the year.

Exports of live cattle from Canada increased in 1933 to twice the number shipped in 1932, the bulk or 50,000 head going to the British market. The new British regulations regarding imports of cattle for slaughter restricts imports of Canadian cattle for the first quarter of 1934 to the same number as during that period of 1933. Beef exports to the United Kingdom also increased considerably during 1933, the quantity shipped to that country amounting to 7,173,000 pounds compared with only 1,478,000 pounds in 1932. Exports of both live cattle and beef to the United States continued to decrease in 1933.

Foreign Crops and Markets

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

CANADA: Monthly average price per 100 pounds of good and choice beef steers over 1,050 pounds at Toronto and Winnipeg, 1928 - 1932

Month	Toronto					Winnipeg				
	1929	1930	1931	1932	1933	1929	1930	1931	1932	1933
	Dols.	Dols.	Dols.	Dols.	Dols.	Dols.	Dols.	Dols.	Dols.	Dols.
Jan.	9.94	9.75	7.42	5.01	3.59	8.73	9.13	6.11	4.44	3.18
Feb.	9.27	9.78	6.56	5.10	3.34	8.20	9.41	5.82	4.29	2.73
Mar.	9.40	10.20	6.74	5.22	3.64	8.62	9.42	5.78	4.54	3.10
Apr.	10.18	11.06	6.22	5.28	4.07	9.56	10.34	5.53	4.30	3.20
May	11.21	10.70	6.07	5.16	4.43	10.50	10.71	5.22	4.55	3.78
June	11.47	9.50	5.85	5.34	4.58	10.62	9.51	5.22	4.57	3.87
July	11.15	8.13	6.02	5.35	4.54	10.17	7.93	5.57	4.43	4.08
Aug.	10.11	7.21	6.45	5.30	4.43	9.41	5.96	5.45	4.11	3.20
Sept.	9.35	7.22	6.07	4.84	4.34	8.26	5.36	4.82	3.76	3.08
Oct.	9.00	7.27	5.26	4.29	4.20	8.07	5.46	4.26	3.31	2.67
Nov.	8.89	7.29	5.27	3.68	4.52	7.97	5.83	4.30	3.06	3.41
Dec.	9.63	7.34	5.00	3.55	5.12	8.91	5.83	4.28	2.79	3.71
Yearly average	10.16	8.78	5.99	4.90	4.23	8.95	6.98	5.20	4.38	3.33

Division of Statistical and Historical Research. See page for comparable United States prices.

Compiled from Annual Livestock Market and Meat Trade Review 1932, p.14 and monthly issues. Conversions at par up to and including August 1931. Beginning September 1931, conversions at current monthly rates of exchange as quoted in Federal Reserve Bulletins.

CANADA: Number of cattle on hand and exports of cattle and calves averages 1909-1913, 1914-1918, 1919-1923, 1924-1928, annual 1929-1933

Year ended December 31	Number on hand June 1	Cattle exported			Calves exported		Total cattle and calves exported
		To the United Kingdom	To the United States	Total exports	To the United States	Total	
	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.	Thous.
Av. 1909-13...	3,701	-	-	-	-	-	123
Av. 1914-18...	7,333	2	156	160	46	46	207
Av. 1919-23 ...	9,747	36	219	252	53	53	304
Ave. 1924-28..	9,061	56	130	190	63	64	254
1929	8,825	-	160	163	90	91	254
1930	8,937	5	19	28	35	36	64
1931	7,991	27	9	40	15	16	56
1932	8,511	17	9	28	4	5	33
1933	8,876	50	6	59	-	1	60

Division of Statistical and Historical Research. Compiled from - Livestock Market and Meat Trade Review, Canada, 1930 and 1931, 1932 Livestock and Meat Trade, December, 1933.

WORLD SITUATION IN CATTLE AND BEEF

CANADA: Cattle slaughter, production and export of beef, averages 1909-1913, 1914-1918, 1919-1923, 1924-1928, annual 1929-1933

Year	Inspected slaughter cattle and calves	Total slaughter cattle and calves	Total beef and veal production	Export of beef and veal to		
				Great Britain	United States	Total exports
	Thousands	Thousands	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.
Averages -						
1909-1913	452	a/ 1,218	a/ 426,194	627	2,196	3,371
1914-1918	659	b/	b/	28,227	15,165	62,223
1919-1923	828	1,887	649,007	13,633	26,335	52,179
1924-1928	1,117	1,926	689,379	5,222	26,465	37,790
1929	1,117	1,954	693,457	6	28,666	31,066
1930	978	1,904	675,881	243	4,988	8,037
1931	963	1,702	604,350	524	352	3,757
1932	937	1,669	592,565	1,478	381	4,466
1933	1092	b/	b/	7,173	170	10,008

Division of Statistical and Historical Research.
Compiled from Livestock and Animal Products Statistics 1932 and earlier issues.
Livestock Market and Meat Trade Review, Canada, 1932 and monthly issue, December.
a/ 1910.
b/ No estimate available.

CANADA: Cattle sold at stockyards, average 1919-1923, 1924-1928, annual, 1929-1933.

Year	Sold at stockyards		
	Cattle	Calves	Total cattle and calves
	Thousands	Thousands	Thousands
Average			
1919-1923	856	244	1,100
1924-1928	931	333	1,264
1929	799	379	1,178
1930	606	312	918
1931	646	307	953
1932	570	300	870
1933	598	314	912

Division of Statistical and Historical Research.
Livestock Market and Meat Trade Review, 1923, 1928, and 1929, 1930, 1931, 1932, and monthly issue, December.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

Mexico

Cattle numbers in Mexico according to the census of April 30, 1930, amounted to 3,735,000 head, and show a decrease of 33 percent as compared with the official estimate of the Mexican Government for 1926. Although no definite information on the subject is available as yet, it seems probable that the discrepancy may be accounted for by different methods of estimating. The 1930 census was the first in 30 years. It is not known on what basis intervening estimates were made. However, it is a well known fact that during the revolutionary period ranches in northern Mexico were practically depleted of cattle. It therefore seems in the light of the 1930 census figures, that numbers in 1926 were over-estimated, to some extent.

The United States is the most convenient market for cattle from the northern States of Mexico and cattle owners there find it difficult to market elsewhere profitably. The taxes on the cattle industry in Mexico combined with the long railroad haul makes it improfitable to market in Mexico city which is itself a limited market. The American outlet also is limited and cattle raisers in Sonora which marketed considerable numbers of feeders cattle in the United States prior to 1930, are seeking to improve marketing conditions in their own country, according to a report from Consul Thomas H. Robinson at Nogales.

In former years Mexico marketed as many as 245,000 head in one year in the United States. The number imported in 1933 was only 73,000 compared with 90,000 in 1932 and 171,000 in 1930, the year of the increase in United States import duties. Beef prices in Mexico City have declined almost $5.00 per 100 pounds in 3 years. The average price of beef in that market for December 1933 was $2.77 per 100 pounds compared with $3.42 in January of the same year. The average price for the year 1933 was $3.30 compared with $4.11 in 1931 and $5.94 in 1930, and $7.91 in 1929.

The present disorganization of the Mexican meat industry is described in an article a/ published in the Revista de Economia y Estadistica for January, 1934. The author shows that the beef steer in the process of being marketed goes through 11 different hands including the transportation agencies, and many valuable by-products are wasted in the process, owing to the dispersio of the industry which makes their recovery too costly. Thus, in order to use 5 percent of the total weight of the animal, i.e., the dressed meat (as the hide is often transported back to its place of origin) it is necessary to transport the entire animal, paying double freight for the amount utilized. Apart from the reduction in weight which the animals suffer in the journey, there are the expenses which this occasions. See table, page 191 for details.

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a/ By Francisco Padua L., Scientist in Economic Studies.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

MEXICO: Distribution of the Gross Returns from the Sale of Meat and Other Products from a Beef Steer. 1933.

Agencies involved	Gross returns	Percentage received by the different agencies
	Dollars	Percent
Cattle Owner	$ 9.84	25.52
Transportation Costs	2.70	7.00
Cattle Dealer	2.22	5.76
Slaughter House Fees	1.95	4.92
Government Taxes	1.51	3.91
Wholesale Carcass dealer (introductor)	1.23	3.19
Wholesale Meat Dealer (contratista)	1.08	2.81
Edible Offal Dealer	3.09	8.02
Dealer in Hides, etc.	.24	0.62
Retail Butcher	11.93	30.96
Retailer of Edible Offal	2.81	7.29
Grand Total	$ 38.60	100.00

Compiled from Revista de Economia y Estadistica, Mexico, January, 1934 Article by Francisco Padua, scientist in the Department of Economic Studies.

MEXICO: Monthly average wholesale price of beef per 100 pounds at Mexico City, 1930-1931

Month	1930	1931	1932	1933
	Dollars	Dollars	Dollars	Dollars
Jan.	7.78	6.73	4.82	3.42
Feb.		7.33	4.64	3.22
Mar.	7.54	7.30	4.74	3.21
Apr.	8.84	7.32	4.39	3.43
May	8.84	6.53	3.84	3.27
June	9.68	7.34	4.03	3.26
July	8.12	6.89	4.40	3.56
Aug.	7.73	3.40	4.02	3.19
Sept.	7.30	4.24	4.07	3.06
Oct.	6.85	4.65	3.67	3.07
Nov.	7.11	4.62	3.22	2.90
Dec.	6.61	4.95	3.48	
Yearly ave.	7.91	5.80	4.03	

Division of Statistical and Historical Research.

Compiled from Boletin Mensual del Departamento de Economia y Estadistica - monthly issue. Conversions to U. S. currency made at current rates of exchange. a/ Converted from yearly average as reported in original source. For other years the monthly figures as they appear above have been averaged.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

MEXICO: Distribution of cattle by States according to census of April 26, 1930 with comparisons

Zones and States	Census June 30, 1902	Estimate 1926	Census April 26, 1930
	Thousands	Thousands	Thousands
North			
Coahuila	182	102	62
Chihuahua	396	398	151
Durango	233	133	162
Nuevo Leon	123	148	100
S. Luis Potosi	175	111	164
Tamaulipas	178	140	99
Zacatecas	190	230	270
Total	1,477	1,262	1,008
North Pacific			
Lower Calif.	52	130	18
Nayarit (Tepic)	152	141	60
Sinaloa	106	224	140
Sonora	261	483	77
Total	571	978	295
Gulf			
Campeche	42	18	5
Quitana Roo	-	1	a/
Tobasco	106	129	20
Veracruz	393	269	224
Yucatan	182	53	31
Total	723	470	280
South Pacific			
Colima	51	48	10
Chiapas	191	150	92
Guerrero	162	200	169
Oaxaca	105	113	222
Total	509	511	493
Central			
Aguascalientes	50	33	29
D. Federal	12	45	29
Guanajuato	274	266	308
Hidalgo	51	135	93
Jalisco	664	886	290
Mexico	108	165	212
Michoacan	498	529	356
Morelos	51	36	51
Puebla	79	128	195
Queretaro	65	104	58
Tlaxcala	12	37	33
Total	1,864	2,364	1,659
Grand total	5,142	5,585	3,735

Division of Statistical and Historical Research. Report of Vice Consul Taylor November 25, 1932, Boletin Mensual Dec. 15, 1927 del Dept. de Economia y Estadistica, and Direccion general de Estadistica 1902.
a/ Less than 500.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

South American exporting counties

European restrictions on imports of chilled and frozen beef have reduced South American exports of those products, and have tended to increase exports of canned beef. New export markets are being sought, and at the same time domestic consumption is being stimulated. Consumers are being urged to use the better cuts, i.e., those formerly exported especially to the United Kingdom. The livestock industries in the various countries are now the subject of intensive study with the object of making the necessary readjustments to the current trend in national economics which appears to be toward self sufficiency.

Argentina

Slaughtering of cattle in Argentina in packing plants and at Liniers market amounted to 2,979,000 head for the first 11 months of 1933, an increase of 6 percent above the same period of 1932. Of that amount, approximately 73 percent was slaughtered in packing plants or the same percentage as last year, but 2 percent less than in 1931. The number slaughtered at Liniers market are mostly for domestic consumption. Slaughter in 1931 and 1932 in packing plants and Liniers market exceeded 3,200,000 each year, but was considerably lower than in the 5 years, 1926-1930 when it averaged over 4,000,000.

Beef exports from Argentina, the chief beef exporting country of the world, reached 1,700,000,000 pounds in 1927 and were about 7 times as large as those from Uruguay, the second most important beef exporting country. In earlier years, i.e., before the war, frozen beef was the chief item, but beginning in 1920 chilled beef exports increased rapidly, and in 1927 had reached a total of 1,000,000,000 pounds, or almost 10 times greater than in 1920. At the same time exports of frozen beef fell from 806,000,000 pounds in 1920 to 521,000,000 in 1927.

The calendar year figures do not give a correct picture of the reductions in exports as a result of the Ottawa Conference as the basic year was taken as July 1931 to June 1932. Exports of Argentine chilled beef to the United Kingdom during the Ottawa year amounted to 860,821,000 pounds, or 87 percent of the total United Kingdom imports of chilled beef, according to official import statistics of the United Kingdom. However, as a result of restrictions placed on imports in November and December, 1932 and in 1933 the total for 1932-33 was reduced 2 percent. In the last half of 1933 shipments were reduced 13 percent compared with the same period of 1931 and 15 percent as compared with that period of 1932. Therefore, a reduction of 10 percent according to the new regulations, as compared with the same period of the Ottawa year means an increase in Argentina above the present percent decrease of about 13 percent.

Frozen beef shipments do not seem to have fallen off to the extent indicated in the provisions of the British regulation, probably due to the fact that frozen offal, etc., imports of which were not specifically limited in the original import restrictions, are included in the total. During the

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

Ottawa year shipments of frozen beef to the United Kingdom from Argentina amounted to 68,517,000 or ¼ percent of the total frozen beef imports into the United Kingdom. During 1932-33 Argentina supplied 24 percent more frozen beef than in 1931-32. The increase was in the first half of 1933. However, during the last 6 months of 1933 exports of frozen beef from Argentina were 20 percent below those of the same period of 1932 and 8 percent below that period of 1931.

Relatively small quantities of Argentine beef come to the United States, mostly in the form of canned beef. During the first half of 1933 Argentina sent about 12,000,000 pounds of canned meat to the United States, or about 3 times as much as in the same period of 1932. During the entire year 1933 United States imports of canned beef were twice as large as in 1932. Total annual exports of canned beef from Argentina in recent years have averaged about 120,000,000 pounds.

One of the indirect results of the adoption of the Ottawa arrangements by the United Kingdom has been the passing of the law creating the Argentine National Meat Board. This law provides a control over the meat industry long desired by livestock producers, and is to be administered by a commission composed of nine members. Four of the members are to be selected from lists submitted by the Argentine Rural Society and other rural societies of persons who have been engaged in cattle breeding at least 5 years prior to their appointment. Three members are to be selected by the President from persons cognisant of freight questions, the meat trade, and conditions in the cattle producing parts of the country. There is to be one representative of provincial industrial concerns formed by cattle breeders and one chosen from three names submitted by private packing houses.

Among the general duties of the Commission as outlined by the Ministry of Agriculture are the following: (1) Investigation of the working of the packing plants in order to ascertain the reason for the widespread discrepancy between prices paid to producers and selling prices in foreign markets, and (2) the question of establishing correct classifications of livestock so that the producer may be insured a fair return. See price tables, pages 195 and 196.

In a recent study of the Argentine meat industry, reported by Assistant Agricultural Commissioner C. L. Luedtke at Buenos Aires, it is stated that the producer of cattle receives at present only 65 percent of the returns from the sale of the meat and by-products yielded by his stock. This is said to be below the returns secured by cattle producers in the United States. The widely distributed producing units as opposed to the unified outlets for livestock is cited as the chief reason for the relatively low returns. The new law looks toward greater cohesion of cattle raisers, offering them sufficient guarantees in the trade and granting them immediate participation in the profits of the packing-house business. Producers selling for domestic consumption are reported as receiving an even smaller percentage of the ultimate returns than do sellers for export. About 65 percent of the total national cattle production is consumed at home.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

It is believed by a well known Argentine economist that Argentina is entering a period of progressively smaller meat exports, Mr. Luedtke reports. This situation is seen as a result of the falling off in international trade, and the continuance of restrictive policies on the part of foreign governments. Argentina, therefore, may be compelled to look to her domestic markets as an increasingly important outlet for what was formerly export meat.

ARGENTINA: Monthly average price of beef steers a/ per 100 pounds live weight basis purchased by the packers on the "estancias" (ranches)

Month	1924	1925	1926	1927	1928	1929	1930	1931	1932	1933
	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.	Dolls.
Jan.	---	5.28	5.38	4.20	5.50	5.68	5.63	3.97	2.48	1.97
Feb.	---	5.12	5.42	4.36	5.59	5.73	5.28	4.07	2.48	2.03
March	---	5.61	5.29	4.57	5.82	5.75	5.32	4.44	2.38	2.24
April	---	5.83	5.32	4.81	6.01	5.72	5.26	4.26	2.35	2.34
May	3.38	6.18	5.32	4.95	6.20	5.66	5.38	3.87	2.39	--
June	3.56	6.16	5.35	5.02	6.50	5.65	5.31	3.85	2.48	2.87
July	4.03	6.34	5.45	5.28	6.66	5.89	5.26	3.89	2.45	3.31
August	4.67	6.39	5.53	6.06	6.57	6.09	5.35	3.65	2.45	3.40
Sept.	5.04	6.51	5.45	6.42	6.56	6.10	5.27	3.37	2.45	3.60
Oct.	5.65	6.54	5.04	6.70	6.45	6.46	5.01	3.84	2.27	3.66
Nov.	5.79	5.92	4.64	6.39	6.11	6.42	4.88	3.07	2.18	
Dec.	4.89	5.51	4.29	5.68	5.62	5.94	4.42	2.65	2.06	
Annual av.	---	5.35	5.17	5.18	6.07	5.89	5.21	3.65	2.37	

Foreign Agricultural Service Division and Division of Statistical and Historical Research. Source: Meat Control Division, Argentina Ministry of Agriculture. Supplied by Charles L. Luedtke, Assistant Agricultural Commissioner, U.S. Dept. of Agriculture, Buenos Aires, Argentina, for years 1924 to 1932. a/ Includes bulls, steers, and oxen.

ARGENTINA: Purchases of cattle and calves by freezing companies, January-October, 1929-1933

Period and Year	Steers, bulls and oxen	Cows and heifers	Calves	Total
	1,000	1,000	1,000	1,000
Jan.-Oct.				
1929	1,735	424	209	2,238
1930	1,678	376	183	2,237
1931	1,525	249	153	1,927
1932	1,561	135	169	1,865
1933	1,598	199	158	1,955

Division of Statistical and Historical Research. Compiled from Ministerio de Agricultura Division de Contralor del Comercio de Carne.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

ARGENTINA: Average price and live weight of cattle sold at Liniers market, Buenos Aires, years 1930-1932, first six months 1933 with comparison

Classification	Average price per 100 pounds live weight					Average live weights				
	Calendar years			Six months		Calendar years			Six months	
	1930	1931	1932	1932	1933	1930	1931	1932	1932	1933
	Dolls	Dolls	Dolls	Dolls	Dolls	Lbs.	Lbs.	Lbs.	Lbs.	Lbs.
Steers -										
Chilled	5.15	3.36	2.12	3.28	2.01	1,168	1,140	1,127	1,135	1,135
Frozen	4.65	2.84	1.66	1.98	1.82	1,285	1,321	1,332	1,329	1,132
Continental	4.82	3.05	1.77	2.00	1.78	1,091	1,111	1,116	1,107	1,105
Butcher	4.63	3.17	1.88	2.09	1.75	930	959	981	970	963
Lightweights	4.78	3.52	2.13	3.44	1.91	710	731	701	705	703
Cows -										
Special	4.63	3.36	2.02	2.19	1.73	972	952	946	946	957
Fat	3.95	2.74	1.67	1.79	1.42	1,005	1,023	996	1,003	1,065
For preserved meat	2.87	1.96	1.14	1.77	0.90	877	941	1,003	955	939
Heifers	4.73	3.49	2.10	3.06	1.88	670	679	659	661	672
Calves	5.35	-	2.55	2.68	2.22	414	425	430	417	417
Vealers (mamones)	6.57	4.94	3.21	3.57	2.81	231	236	236	236	238
Bulls and oxen	3.22	2.01	0.98	1.15	2.89	1,358	1,340	1,387	1,336	1,373

Division of Statistical and Historical Research.
Compiled from Mercados de Ganado y Carnes and from Boletin Mensual de Estadistica Agropecuario December - June.

ARGENTINA: Monthly slaughter in meat packing establishments and at Linier market, Buenos Aires, years 1931-1933

Year and month	Freezing and chilling plants	Preserved or canned meat factories a/	Liniers market	Total
	Thousands	Thousands	Thousands	Thousands
1931				
Jan.	208	24	74	306
Feb.	184	33	66	283
Mar.	210	37	74	321
Apr.	211	34	79	324
May	198	27	69	294
June	201	b/	69	270
July	180	b/	67	247
Aug.	170	b/	62	232
Sept.	172	b/	57	229
Oct.	186	b/	62	248
Jan.-Oct.	1,920	155	679	2,754

Continued -

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

ARGENTINA: Monthly slaughter in meat packing establishments and at Linier market, Buenos Aires, years 1931-1933, cont.

Year and month	Freezing and chilling plants	Preserved or canned meat factories a/	Liniers market	Total
	Thousands	Thousands	Thousands	Thousands
1931, Cont.				
Nov.	171	4	62	237
Dec.	203	b/	71	274
Total year c/	2,294	159	812	3,265
1932				
Jan.	178	9	69	256
Feb.	162	26	66	254
Mar.	172	27	69	268
Apr.	184	30	73	287
May	188	17	71	276
June	201	b/	71	272
July	189	b/	71	260
Aug.	190	b/	71	261
Sept.	188	b/	70	258
Oct.	182	b/	74	256
Jan.-Oct.	1,834	109	705	2,648
Nov.	175		77	252
Dec.	197	d/ 1	89	287
Total year c/	2,206	e/ 110	871	3,187
1933				
Jan.	215	11	83	309
Feb.	179	23	74	276
Mar.	206	37	87	330
Apr.	183	27	77	287
May	191	29	79	299
June	183	4	80	272
July	198	b/	78	276
Aug.	200	b/	79	279
Sept.	197	b/	72	269
Oct.	193	b/	73	266
Jan.-Oct.	1,950	131	782	2,863
Nov.				
Dec.				

Division of Statistical and Historical Research. Compiled from report of the Division de Contralor de Comercio de Carne for 1931, 1932 and 1933. a/ Preserved or canned meat unless otherwise noted. b/ Less than 500. c/ These figures are correct additions of the monthly figures. The annual totals differ somewhat as follows; in thousands of head, in the same order: 1931, 2,297, 156, 809, 2,261; 1932, 2,214, 122, 873, 3,209. d/ Salted. e/ Includes 1,000 head slaughtered at salting plants.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

ARGENTINA: Exports of beef, by countries, 1913, 1930-1932 and January-June 1932 and 1933 a/

Commodity and country to which exported	Year ended December 31				Jan. - June	
	1913	1930	1931	1932	1932	1933
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
CHILLED:						
Germany	0	525	11	15	b/	60
United Kingdom	74,425	759,593	774,621	816,165	395,435	381,065
Other countries	917	1,626	1,888	920	229	44
Total	75,342	761,744	776,520	817,100	395,664	381,169
FROZEN:						
Germany	0	31,722	2,459	1,825	1,195	556
Belgium	1,345	22,284	11,914	2,048	1,188	2,158
France	1,691	25,900	38,340	16,601	7,595	9,544
United States	6,243	104	432	472	240	172
Italy	7,527	8,199	5,957	4,370	1,466	1,682
Netherlands	3,016	8,763	5,919	4,727	2,679	2,000
United Kingdom	708,345	111,476	118,175	49,379	30,554	20,551
Other countries	3,879	9,252	1,277	1,399	363	2,409
Total	732,046	217,700	184,483	80,821	45,280	39,072
JERKED:	8,621	341	56	9	0	2
PRESERVED: c/						
United Kingdom	17,036	81,449	84,934	65,774	29,132	38,226
Germany	3	2,255	1,612	1,667	549	1,014
United States	351	28,684	13,106	10,617	3,688	11,728
Belgium	0	3,146	3,287	3,902	1,444	1,911
Canada	0	7,030	4,533	3,419	1,700	1,612
France	0	2,881	5,672	1,779	710	1,034
Netherlands	201	2,826	1,272	1,671	267	1,146
Other countries	10,129	9,340	7,009	8,559	4,276	5,413
Total	27,720	137,611	121,425	97,388	41,766	62,084
TOTAL BEEF, CHILLED FROZEN, JERKED AND PRESERVED:	843,729	1,117,396	1,082,484	995,318	482,710	482,327

Foreign Agricultural Service. Compiled from Anuario del Comercio Exterior, 1913 and 1930-1932; and Boletin Mensual de Estatistica Agropecuaria, June issue 1932, and Boletin Mensual del Ministerio de Agricultura de la Nacion, June issue 1933. a/ Fresh beef not reported separately. b/ If any, included in other countries. c/ May include small quantity of other kinds of meat.

WHEAT: Acreage and production, New Zealand, average 1928-29 to 1932-33, annual 1928-29 to 1933-34

Year	Acreage	Production
	1,000 acres	1,000 bushels
Average 1928-29 to 1932-33	262	8,258
1928-29	255	8,833
1929-30	236	7,240
1930-31	249	7,579
1931-32	269	6,583
1932-33	303	11,055
1933-34	295	8,488

Compiled by Foreign Agricultural Service from official sources.

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COTTON: Prices per pound of representative raw cottons at Liverpool, January 26, 1934 with comparisons

Description	1933 December 1	8	15	22	29	1934 January 5	12	19	26
PRICES	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
American									
Middling	11.12	11.20	10.35	11.18	11.28	12.03	12.45	12.64	12.48
Low Middling	10.26	10.35	11.21	10.33	10.43	11.17	11.60	11.81	11.66
Egyptian(Fully good fair)									
Sakellaridis	15.42	15.15	15.28	15.56	16.38	17.66	18.06	17.55	17.52
Uppers	12.55	12.46	12.55	12.73	12.80	13.61	14.06	14.12	13.72
Brazilian (Fair)									
Ceara	11.23	11.31	11.10	11.07	11.17	11.81	12.24	12.43	12.17
Sao Paulo	11.34	11.42	11.31	11.28	11.39	12.03	12.45	12.64	12.38
East Indian									
Broach(Fully good)	8.68	8.56	8.37	8.37	8.49	9.08	9.53	9.53	9.29
Oomra #1, Fine	8.59	8.66	8.47	8.41	8.53	9.13	9.53	9.53	9.23
Sind(Fully good)	7.43	7.51	7.30	7.26	7.38	7.98	8.38	8.40	8.12
Peruvian (Good)									
Tanguis	13.82	13.98	13.98	13.94	14.03	14.69	15.09	15.25	15.05
Mitafifi	14.04	13.87	13.87	13.84	14.81	15.99	15.88	15.67	15.42

Compiled by Foreign Agricultural Service Division from the Liverpool Cotton Association Weekly Circular. Converted at current exchange rate.

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GRAINS: Exports from the United States, July 1-Feb. 10, 1932-33 and 1933-34
PORK: Exports from the United States, Jan. 1-Feb. 10, 1933 and 1934

Commodity	July 1 - Feb. 10		Weeks ended			
	1932-33	1933-34	Jan.20	Jan.27	Feb. 3	Feb.10
GRAINS:	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Wheat a/	19,997	9,081	816	874	47	1,384
Wheat flour b/	12,902	10,768	291	141	268	258
Rye	286	16	---	---	---	---
Corn	6,275	3,380	7	30	45	94
Oats	3,276	379	5	5	1	1
Barley a/	6,452	4,107	260	26	39	232
	Jan. 1 - Feb.10					
	1933	1934				
PORK:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Hams & shoulders incl. Wiltshire sides	5,144	1,611	223	c/	256	244
Bacon incl. Cumberland sides	2,628	2,589	598	c/	258	326
Lard	106,538	48,002	8,885	c/	7,294	7,042
Pickled pork	1,478	659	93	c/	138	193

Division of Statistical and Historical Research. Source: Official records - Bureau of Foreign and Domestic Commerce. a/ Included this week: Pacific Ports wheat 1,384,000 bushels, flour 43,500 barrels, from San Francisco; barley 232,000 bushels; rice 965,000 pounds. b/ Includes flour milled in bond from Canadian wheat in terms of wheat. c/ Not available.

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries as given by current trade sources, 1931-32 to 1933-34

Country	Total shipments		Shipments, 1934 weeks ended			Shipments July 1 - Feb. 10	
	1931-32	1932-33	Jan.27	Feb.3	Feb.10	1932-33	1933-34
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America a/	335,638	298,504	4,144	5,055	3,960	206,584	141,247
Canada, 4 markets b/	206,258	289,257	1,179	1,881	1,125	197,431	127,647
United States c/	135,797	41,211	1,015	315	1,638	32,899	19,849
Argentina	144,576	115,412	4,047	3,561	4,178	43,404	71,566
Australia	161,288	153,400	3,314	2,646	2,160	79,880	57,832
Russia d/	71,664	17,408	1,368	640	648	16,784	25,136
Danube & Bulgaria d/	39,280	1,704	256	272	96	1,616	10,440
British India	c/2,913	c/ 871	0	0	0	0	0
Total e/	753,359	587,299	13,129	12,174	11,042	548,268	306,221
Total European shipments a/	597,976	448,672	10,096			f/258,648	f/235,408
Total, ex-European shipments a/	194,464	164,256	3,232			f/ 81,864	67,936

Division of Statistical and Historical Research. Compiled from official and trade sources. a/ Broomhall's Corn Trade News. b/ Fort William, Port Arthur, Vancouver Price Rupert, and New Westminster. c/ Official. d/ Black Sea shipments only. e/ Total of trade figures includes North America as reported by Broomhall's. f/ To January 27.

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THE WORLD SITUATION IN CATTLE AND BEEF

Uruguay

During the year ended June 30, 1933, the first year in which the British import restrictions were in force, Uruguay supplied the United Kingdom with 55,000,000 pounds of chilled beef or about 8 percent of total imports of that type of meat and a reduction of 20 percent as compared with 1931-32. There was a considerable increase in the last half of 1933 compared with the same period of 1932, however. Frozen beef shipments for the year ended June 30, 1933 fell off 22 percent and for the last half of 1933 they fell 40 percent below the same period of 1932. In the Ottawa year 1931-32 Uruguay supplied about 8 percent of total frozen beef shipments into the United Kingdom.

Uruguay comes next to Argentina as a beef exporting country, although the total quantity has never exceeded the 355,000,000 pounds reached in 1923. Prior to 1913 the bulk of the beef exported was composed of jerked beef with a little preserved. From 1913 to the present time frozen beef has been the largest item. Chilled beef exports increased from 5,000,000 pounds in 1915 to over 90,000,000 in 1930. Exports of beef to all countries for the years 1931 and 1932 were much below those of 1930. That year, of the total exports, 39 percent frozen went to the United Kingdom as did practically all of the chilled beef exported. Of the canned beef exports, 62 percent went to the United Kingdom and 26 percent to the United States. See table, page 217.

Ranches in Uruguay are reported in reasonably good condition, although more rain is needed. There was an increase in receipts of cattle and calves at Tablada Norte, the principal stock yards in Montevideo, receipts reached 708,000 head during the first 11 months of 1933 and were 12 percent above the same period of 1932. Slaughter at freezing companies for the same period amounted to 752,000 head, an increase of 8 percent above the same period of 1932. In 1932 total commercial slaughter, i.e., exclusive of animals killed on farms amounted to 916,000 head and showed a reduction of 17 percent as compared with 1931. During the 5 years, 1926-1930, slaughter averaged 1,292,000 head annually. The price of cattle in Uruguay in 1932 had fallen to less than half that of 1928 and 1929. The minimum price of beef steers at the Tablada Norte, Montevideo for the year 1932 was only 64 cents per 100 pounds and the maximum $2.13. In 1928 and 1929 the minimum price was above $2.60 per 100 pounds and the maximum over $5.20. The average annual minimum and maximum prices for the 5 year period 1923-1927 was $1.72 - $5.08 and for the 5 year period 1918-1922 it was $2.57 - $6.57.

The Uruguayan government has bought one of the commercial frigorificos owned by a foreign company, according to Consul General L. E. Reed at Montevideo. The plant has been operated by the government on a rental basis since 1929. The government favored purchase rather than sequestration so as to avoid controversy with respect to the export beef quota granted the plant under private ownership. The plant quota of export beef for Great Britain is 12,000 metric tons. The plant in question is small compared with others operated in the Montevideo district.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

URUGUAY: Monthly receipts of cattle and calves at North Stock yards (Tablada Norte) Montevideo, 1929-1933

Month	1929	1930	1931	1932	1933
	Number	Number	Number	Number	Number
January	82,431	104,957	68,667	58,931	62,103
February	79,782	108,741	86,356	62,339	48,469
March	53,500	101,260	82,598	83,444	73,745
April	118,791	100,233	93,595	83,611	64,225
May	120,731	83,960	110,401	64,963	80,681
June	80,747	87,985	83,114	56,390	86,894
July	81,854	79,860	45,475	41,569	70,742
August	52,210	55,745	43,167	54,642	70,165
September	45,843	61,861	52,596	41,699	39,920
October	55,154	66,658	45,555	37,309	47,017
November	58,872	60,297	56,639	47,633	a/ 59,056
December	85,103	69,511	69,552	57,569	
Year	915,018	981,067	981,109	690,199	

Division of Statistical and Historical Research. Compiled from Association Consignatarios de Ganados.

a/ The total receipts for 11 months were as follows: 1933, 708,000; 1932, 633,000; 1931, 912,000; 1930, 929,000; 1929, 830,000.

URUGUAY: Minimum and maximum prices per 100 pounds paid for steers and cows at Tablada Norte (North Stock Yards) Montevideo, average 1918-1927, annual 1928-1932

Year	Steers	Cows
	Dollars	Dollars
Average		
1918-122	2.57 - 6.57	2.27 - 6.28
1923-1927	1.72 - 5.08	1.43 - 4.74
1928	2.65 - 5.22	2.33 - 4.98
1929	2.68 - 5.82	2.24 - 5.14
1930	2.34 - 4.98	1.95 - 4.09
1931	1.52 - 3.93	1.01 - 3.24
1932	.64 - 2.13	.32 - 1.34

Division of Statistical and Historical Research. Compiled from Association Consignatorios de Ganados, Feb. 3, 1933.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

URUGUAY: Exports of beef, by countries, average 1909-1913, annual 1930-32 and January-June, 1932 and 1933

Commodity and country to which exported	Year ended December 31				Jan.-June	
	Average a/ 1909-1913	1930	1931 b/ prel.	1932 b/ prel.	1932 b/	1933 b/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
FROZEN:						
Belgium	644	11,400				
France	- -	51,060				
United Kingdom	29,011	58,085				
Germany	- -	3,943				
Italy	1,647	19,096				
Netherlands	- -	1,195				
United States	1,677	1,081				
Other countries	7,880	2,218				
Total	40,859	148,078	93,128	85,737	47,676	36,504
CHILLED:						
Total	- -	98,286	108	58,687	38,621	36,307
SALTED:						
Total	- -	2,037	c/	c/	c/	c/
PRESERVED, CANNED: d/						
United Kingdom	7,716	47,116				
United States	613	19,705				
Germany	- -	2,091				
Belgium	695	1,415				
Other countries	211	5,595				
Total	9,235	75,922	63,700	44,435	24,004	28,120
JERKED:						
Total	96,044	6,899	3,460	718	219	923
TOTAL BEEF, FROZEN, CHILLED, SALTED, PRESERVED, JERKED	146,138	331,222	160,396	189,577	110,520	101,854

Foreign Agricultural Service. Compiled from Annuario Estadistico de la Republica Oriental del Uruguary, Part 3a, and Sintesis Estadistica de la Republica Oriental del Uruguay, August 1932 and 1933. a/ Average 1909-1913, if available, otherwise for any years or year within this period. b/ Not available by countries. c/ Not yet available. d/ Includes all preserved meats.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

Brazil

. ...Imports of Brazilian beef into the United Kingdom, the leading market, during the year ended June 30, 1933 amounted to only 52,000,000 pounds, a falling off of 15 percent as compared with the standard Ottawa year. However, during the last half of 1933 they increased heavily. Exports of Brazilian beef to the United States are very small as they are not separately listed in the United States import statistics, but if any, have been included with other countries. Exports of chilled and frozen beef from Brazil in 1932, the last year for which figures are available, were 40 percent smaller than the corresponding 1931 exports and about 60 percent smaller than the 1930 figures. Beef production in Brazil was roughly estimated at 2,116,000,000 pounds in 1930. That year exports totaled 227,000,000 pounds or a little over one-tenth of the total quantity produced. In 1932, total exports were only about 88,000,000 pounds.

Xarque or dried beef is not exported to any great extnet but is consumed very generally in Brazil and at one time was the most important industry of Rio Grande do Sul. Production in that State, however, has been decreasing recently. Of the total slaughter of cattle and calves in Brazil in 1931, roughly estimated at about 5,000,000 head, about 500,000 were slaughtered in the State of Sao Paulo, mostly for frozen and chilled beef for export, and about 600,000 in the State of Rio Grande do Sul, about half for freezing and chilling for export and half for making xarque or dried beef for local consumption. The frozen and chilled meat industry is located principally in the State of Sao Paulo, although some is exported from Rio Grande do Sul also, whereas the dried beef industry was originally located principally in the State of Rio Grande do Sul.

The total number of cattle in Brazil in 1932 is now officially estimated at 42,539,000 according to the International Institute of Agriculture, the number being larger than in any of the important beef exporting countries. Unofficial estimates, by provinces, give the distribution as follows: 28 percent in Rio Grande do Sul; 25 percent in Minas Geraes; 10 percent in Goyas and 9 percent in Matto Grosso. The official figure for Sao Paulo is 2,093,000, according to the State Diretoria de Estatistica Industria e Comercio, according to Consul C. R. Cameron, or about 5 percent of the total number in that country. This figure is believed to be the correct estimate of the number in that State. The number has been estimated higher than this by other agencies.

As a means of agricultural relief in Rio Grande do Sul, the government has announced the reduction of all farm mortgage indebtedness by 50 percent, according to Consul R. S. Castleman at Porto Alegre. Mortgage holders are given government bonds for that part of their farm paper cancelled by the order. The cattle industry is expected to benefit considerably by the measure in view of the reduced burden of interest payments. The State also is considering a

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

proposal to rescind certain tax exemption privilages enjoyed during the past 15 years by the meat packing companies, and due to run for another 15 years. The step is being fostered by the cattle raisers on the ground that the packing plants have been instrumental in reducing cattle prices to a greater extent than is warranted by market conditions.

BRAZIL: Number of cattle in principal cattle raising provinces and total 1912-13, 1916, 1920, 1926, 1927, and 1932

Period	Five principal Provinces						Other	Grand total
	Rio Grande do Sul	Minas Geraes	Goyaz	Matto Grosso	Sao Paulo	Total, 5 provinces		
	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
Census 1912-13	7,249	6,861	1,873	2,550	1,322	19,855	10,850	30,705
Estimate 1916	6,658	6,343	1,935	2,718	1,793	19,447	9,515	28,962
Census 1920	8,489	7,335	3,021	2,832	2,442	24,117	10,154	34,271
Estimate 1926	a/9,587	8,706	--	--	--	--	--	
" 1927 b/	9,120	7,830	3,420	3,850	2,900	27,120	--	--
" 1931	--	--	--	--	c/2,093	--	--	--
" 1932	--	--	--	--	--	--	--	42,539

Compiled from Synopse do Censo Pecuario da Republica Brazil 1912-13, page 36; 1916 Estimativa do Gada Existente no Brazil em 1916, 1920 page 7. Minas Geraes 1926 A industria da criacao em Minas Geraes 1928 p. 16. Rio Grande do Sul 1926 Vice Consul E. Hitchel, 1932 International Institute of Agriculture, March, 1933. a/ According to provincial estimates compared with an estimate of 9,172,000 in 1920 from the same cource. b/ Estimates published by the Manchester Guardian in the Commercial devoted to Brazil, June 27, 1929, p. 19, and stated to be official c/ The number of cattle in Sao Paulo in 1931 as estimated by the Section of Agricultural and Zootechnic Statistics of the State of Sao Paulo.

BRAZIL: Exports of beef, average 1909-1913, annual 1929-1932 and January-October, 1932 and 1933

Commodity	Year ended December 31				Jan - Oct.	
	Average 1909-1913	1930	1931 prel.	1932 prel.	1932	1933
	1,000 pounds	1,000 pounds	1,000 Pounds	1,000 pounds	1,000 Pounds	1,000 pounds
Jerked and Dried beef.....	339	8,038	2,324	631	536	258
Beef, chilled or frozen	a/	218,689	146,989	87,931	a/	a/

Foreign Agricultural Service. Compiled from Commercio Exterior de Brazil, Annual 1909-1913, 1930: Commercio Exterior de Brazil (Resumo por mercadarias), and Commercio Exterior de Brazil, October issue 1933, a/ Included with frozen and chilled meat.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

British Empire countries in the Southern Hemisphere

Australia

Australia, with 12,260,000 cattle in 1932, is the most important beef exporting country of the British Empire. During the first 10 months of 1933 slaughter for export amounted to 450,000 head, an increase of 31 percent above the same period of 1932. During the calendar year 1932 397,000 cattle and calves were slaughtered for export a decrease of 7 percent as compared with 1931. The 5 year average for the years 1926-1930 was 411,925. Total slaughter in Australia in 1931 amounted to 1,751,000 head, 36 percent of which was slaughtered in New South Wales and 31 percent in Queensland.

Queensland is the state most vitally interested in the export trade about 83 percent of the total exports of beef originating in that State. The number of cattle in Queensland at the end of 1933 is unofficially estimated at 5,500,000 or about the same as at the end of 1932 and 1,500,000 below the record for the state. During the first half of 1933, 168,000 head were treated for export in that state an increase of 6 percent as compared with the first half of 1932.

Hitherto, practically all of the beef exported from Australia has been in the frozen state, but efforts are being made to build up a chilled beef industry. However, under the terms of the Ottawa agreement, frozen beef exports to the United Kingdom during 1933 were restricted to 90 percent of the 1931-32 exports. No restrictions were placed on Australian beef after 1933, but subsequently Australia agreed to restrict exports up to June 1934. Statistics of imports into Great Britain show that in the year ended June 30, 1933 imports from Australia were 11 percent smaller than in the base year 1931-32. During the last half of 1933, such imports were 25 percent greater than in the corresponding 1932 period.

New Zealand

There are about 1/3 as many cattle in New Zealand as in Australia the number in 1933 being 4,182,000, the largest number ever reported in that country. Slaughter of cattle and calves in 1932 is estimated at 933,000 according to preliminary returns or about the same as in 1931. The production of veal is growing in New Zealand and slaughter of calves will soon reach 600,000 head annually states "Meat and Wool" for October, 1933. Total beef and veal production in 1932 amounted to 304,000,000 pounds, about 1/4 of which was veal. Veal Production has increased, along with dairying, from 10,000,000 pounds in 1926 to 73,000,000 in 1932.

New Zealand also is a surplus beef producing country but exports have not reached a very large total as yet. The New Zealand Meat Producers Board has advised the British authorities that the quantity of frozen beef,

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

including boneless beef, to be shipped up to June 30, 1934 will approximate 56,000,000 pounds. No restriction was placed on the exports of New Zealand beef in the Ottawa agreement. During the first 11 months of 1933 exports increased 50 percent above the figures for the corresponding 1932 period. Exports to the United Kingdom for the year ended June 30, 1933 reached 83,000,000 pounds, an increase of almost 100 percent above the Ottawa base year 1931-32.

Union of South Africa

Cattle in the Union of South Africa have been increased steadily for a long series of years and in 1931 were numbered at 10,754,000 compared with 6,852,000 in 1918. The Ottawa agreement limiting the movement of chilled beef to Great Britain from South America has stimulated interest in developing a trade in that product in South Africa. Most shipments so far made to British markets have been fairly well received, although the quality of the meat has not yet reached that of the Argentine product. It is officially stated that a considerable time must elapse before the Union of South Africa can build up its herds to the point of sustaining a significant supply of animals suitable for the chilled beef trade. As yet, only Europeans are interested in the beef export business. The bulk of the cattle in the Union are owned by natives, who regard them as an indication of wealth in themselves, and who are not widely interested in their cattle as a source of money income. In 1933 approximately 18,000,000 pounds of beef were exported, of which only 500,000 pounds were chilled. Rhodesia also is interested in the chilled beef trade.

AUSTRALIA: Exports of beef, by countries, average 1909-1913 annual 1930-1932 and January-September, 1932 and 1933

Country to which exported	Average 1909-1913	Year ended December 31			January-September	
		1930	1931	1932	1932	1933
FROZEN:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom	100,876	92,865	116,247	108,674	94,642	109,256
Belgium	a/ 35	20,514	24,865	10,412	9,362	4,488
Germany	b/ 956	8,067	0	80	80	c/
United States	1,808	1,450	44	c/	c/	c/
Egypt	2,374	5,654	4,825	5,856	4,248	2,961
Japan	d/ 60	4,669	3,384	3,102	2,539	1,712
Philippine Islands	12,030	6,798	4,271	5,142	3,115	2,874
Italy	2,282	2,549	2,735	0	c/	c/
Other countries	9,676	10,357	8,534	8,391	6,392	6,461
Total	130,097	152,923	164,905	141,657	120,378	127,752

Foreign Agricultural Service. Compiled from Trade Customs and Excise Revenue 1909-1913, 1931 and 1932. Quarterly Summary of Australian Statistics, January-June 1933; July-September 1933. a/ One year only. b/ Two-year average. c/ If any, included in "Other countries". d/ Four-year average.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

NEW ZEALAND: Exports of beef and veal, by countries, average 1909-1913, annual 1930-1932 and January-November, 1932 and 1933

Commodity and country to which exported	Year ended December 31				January - November	
	Average 1909-1913	1930	1931	1932	1932 a/	1933 a/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
BEEF, FROZEN:						
United Kingdom	38,337	33,850	38,735	49,298		
United States	121	2,581	665	18		
Other countries	1,484	2,570	97	389		
Total	39,942	38,801	39,497	49,705	46,731	73,950
BEEF, SALTED:						
Total	1,154	324	b/	b/	b/	b/
VEAL, FROZEN:						
United Kingdom	59	6,030	11,142	10,115		
United States	0	373	301	0		
Italy	0	1,649	1,811	0		
Other countries	84	81	33	125		
Total	143	8,133	13,287	10,240	9,007	13,170
TOTAL BEEF AND VEAL	41,239	47,258	52,784	59,945	55,738	87,120

Foreign Agricultural Service. Compiled from Statistical Report on Trade and Shipping of New Zealand, 1909-1913, 1930-1932; Monthly Abstract of Statistics, December issue, 1933. a/ Not available by countries. b/ Not separately classified.

UNION OF SOUTH AFRICA: Export a/ of beef and veal by countries, 1913, 1925-1932

Year ended December 31	Exported to						
	Italy	France	United Kingdom	Belgium	Morocco	Other Countries	Total
FRESH AND FROZEN:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1913	b/	b/	0	b/	b/	121	c/ 121
1925	14,250	6,437	806	336	0	1	21,830
1926	16,159	14,136	2,917	655	0	150	34,017
1927	11,460	256	647	79	0	1,096	13,538
1928	15,748	246	625	5	261	d/	16,885
1929	21,306	b/	3,052	223	0	265	25,046
1930	13,769	8,240	3,782	1,101	1,709	1,148	29,749
1931	14,858	4,646	946	45	0	1,096	21,591
1932	14,690	0	830	0	0	356	15,876

Foreign Agricultural Service. Compiled from Annual Statement of Trade and Shipping of Union of South Africa, 1913, 1925-1932. a/ Excludes ship's stores. b/ If any, included in "Other countries". c/ Includes ship stores amounting to 112,000 pounds. d/ Less than 500 pounds.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

European importing countries

The year 1933 was the third in succession wherein total overseas imports of beef into Great Britain, France, Germany and Netherlands tended downward. Argentine beef was the item most adversely affected by the steps taken to strengthen the position of domestic producers in the countries indicated. Continental European developments were in line with policies in effect for several years. British restrictive measures for beef, however, date only from late 1932, following ratification of the Ottawa Agreement.

United Kingdom

Import figures for December 1933 indicate that the year closed with beef imports running considerably smaller than those of a year earlier. Total beef imports for the year 1933 were slightly smaller than in either of the two preceding years, largely as a result of the limitations placed on imports of Argentine chilled beef. The reduction of about 10 percent was not offset by increases from other countries. So far, only very limited supplies of chilled beef are being received from British Empire exporting countries. In frozen beef, however, such countries, notably Australia and New Zealand contributed materially to the increase of 13.6 percent registered in total imports of that product. Receipts of frozen beef from Australia advanced 21.7 percent over 1932 figures, with imports from New Zealand up 23.1 percent. Imports from the United States, at 5,600,000 pounds, were larger than figures for 1932, but below corresponding imports of 1931.

Information covering January 1934 reflects little or no effect in the British markets on prices of overseas beef as a result of reduced supplies. Best Argentine chilled hindquarters tended to go slightly higher in sterling during January 1934 than a year earlier. Other descriptions of chilled and frozen beef, however, continued to bring prices at Smithfield below those of a year earlier. In 10 out of 12 months during 1933, sterling prices of Argentine chilled hindquarters averaged lower than in the corresponding months of 1932. The result was an unusually low average for the year; chilled forequarters also registered a low annual average price for 1933.

The price table on page 225 presents both sterling and dollar averages for the two descriptions of beef noted above. Formerly, it was regarded as unnecessary to reproduce sterling values in order to illustrate price trends in the British market. During 1933, however, exchange movements so enhanced dollar values that to give only such series would be misleading with respect to the value of the greater part of all the beef sold in Great Britain. The dollar series, however, illustrates the improved returns secured for the limited amounts of American frozen beef sent to Great Britain.

Consular advices are to the effect that imports of fat cattle from the Irish Free State for the period December 20 - March 31, 1933-34 are limited to 50 percent of the receipts of the corresponding 1932-33 period. Feeder cattle receipts from the same source are reduced 12.5 percent for

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

the same period. Receipts of Canadian cattle in the first quarter of 1934 will not be allowed to exceed those of the corresponding 1933 period. Imports of non-Empire frozen beef in the first 3 months of 1934 are to be reduced 30 percent below imports of the first quarter of 1932. Supplies of non-Empire carned beef also are to be limited in 1934. These measures are supplementary to the earlier measures taken to reduce supplies of chilled and frozen beef in British markets.

UNITED KINGDOM: Imports of beef and veal by countries, 1913, 1930-1933.

Commodity and country from which imported	Year ended December 31				
	1913	1930	1931	1932	Prelim. 1933
Fresh, except hearts, tongues, etc. -	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Irish F. State.....	a/	2,359	743	552	-
Other countries	272	1	c/	0	-
Total	272	2,360	743	552	b/3,559
Chilled -					
Argentina	584,194	863,895	886,052	874,089	778,610
Uruguay	3,582	97,069	87,185	56,432	62,864
Other countries	0	56,781	67,050	54,938	73,869
total	587,776	1,017,745	1,040,287	985,459	915,343
Frozen, except hearts, tongues, etc. -					
Argentina	219,056	35,966	25,776	21,010	77,650
Australia	150,916	83,255	117,989	100,111	130,372
New Zealand	27,347	39,017	52,584	70,039	79,156
Uruguay	44,506	26,989	24,349	17,936	12,565
Other countries	898	22,953	16,248	7,332	26,626
Total	442,723	208,180	236,946	216,428	326,369
Total fresh, chilled and frozen	1,030,771	1,228,285	1,277,976	1,201,887	1,241,712
Other -					
Hearts, tongues, livers, kidneys, etc.					
Fresh	c/	833	474	55	d/
Frozen	c/	82,577	81,014	85,998	d/
Salted	5,581	995	654	476	408
Tinned	72,569	122,853	120,339	84,289	d/
Extracts, essences, etc	e/	10,244	7,390	5,861	103,438

Foreign Agricultural Service. Compiled from Trade and Navigation of the United Kingdom; 1913 and 1932; Monthly Accounts Relating to Trade of the United Kingdom, December issue, 1933. a/ If any, included in "Other countries". b/ Not shown by countries. c/ Less than 500.
d/ Included in "Extracts, essences, etc". e/ Included in "Tinned".

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

BEEF (ARGENTINE CHILLED HINDQUARTERS): Monthly average price per pound at London, 1931 to 1933

Month	British currency			United States currency		
	1931	1932	1933	1931	1932	1933
	Pence	Pence	Pence	Cents	Cents	Cents
January	7.12	5.58	6.32	14.45	7.97	8.86
February	6.06	5.31	5.91	12.29	7.65	8.42
March	6.32	6.38	5.69	12.83	9.67	8.13
April	6.41	6.88	6.00	12.99	10.74	8.95
May	6.75	6.72	5.75	13.69	10.30	9.42
June	6.78	6.69	5.78	13.75	10.16	9.96
July	6.88	6.08	5.62	13.94	8.98	10.90
August	7.85	6.78	6.12	15.92	9.82	11.49
September	7.41	6.69	6.38	13.98	9.67	12.39
October	7.41	6.25	6.55	12.00	9.04	12.74
November	6.45	6.62	5.72	10.00	9.04	12.27
December	a/ 6.44	b/ 6.75	6.28	9.05	9.92	13.39
Average	6.82	6.39	6.01	12.91	9.34	10.58

Foreign Agricultural Service Division. Agricultural Market Report.
a/ Two weeks. b/ Three weeks.

BEEF (ARGENTINE CHILLED FOREQUARTERS): Monthly average price per pound at London, 1931 to 1933.

Month	British currency			United States currency		
	1931	1932	1933	1931	1932	1933
	Pence	Pence	Pence	Cents	Cents	Cents
January	4.41	3.15	4.32	8.93	4.50	6.06
February	3.72	3.50	4.12	7.54	5.04	5.88
March	3.60	3.81	4.00	7.30	5.78	5.72
April	3.16	4.56	3.68	6.40	7.13	5.48
May	3.20	4.62	3.44	6.49	7.08	5.63
June	3.09	4.03	3.16	6.27	6.12	5.44
July	3.16	2.95	2.80	6.40	4.36	5.42
August	3.78	2.97	3.19	7.65	4.30	5.98
September	3.66	3.19	3.38	6.90	4.61	6.56
October	3.91	3.15	3.57	6.33	4.46	6.95
November	3.70	3.92	3.69	5.74	5.35	7.91
December	a/3.56	b/4.04	3.69	5.01	5.52	7.86
Average	3.58	3.66	3.59	6.75	5.35	6.24

Foreign Agricultural Service Division. Agricultural Market Report.
a/ Two weeks. b/ Three weeks.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

France

Regulation of frozen beef imports into France by quota has resulted in recent months in practically limiting such receipts to requirements for military and maritime stores. For the last quarter of 1933, such imports were limited to 1,102,000 pounds, the same quantity as was admitted in the corresponding 1932 period. No fresh or chilled beef was admitted in the 1933 quarter indicated against 882,000 pounds in 1932. It is understood that quotas for frozen beef contemplated for the first quarter of 1934 are smaller than those prevailing in 1933. Figures for the first 11 months of 1933 indicate a reduction of 41.8 percent in the total beef imports into France as against corresponding figures for 1932. Uruguay is the leading supplier of the limited French imports of beef. The 1932 returns for the whole year registered a decline of 45.7 percent below the 1931 figures. See table, page 227.

Germany

Only 52,000 pounds of chilled or frozen beef were imported into Germany in 1932 and none in 1933. In 1930, such imports totaled 104,000,000 pounds. Imports of fresh beef from neighboring countries in 1933 were slightly larger than in the preceding year, but that business was only slightly more than one-fourth as large as in 1930, when nearly half of the fresh beef imports were coming from Denmark, with Netherlands second. In 1933, Lithuania was the leading source of the limited German imports of fresh beef, with Denmark second. The decline in foreign beef supplies in Germany is in line with the efforts of that country to become agriculturally self-sufficient. See table, page 227.

Netherlands

Netherlands continues to show a substantial import balance in beef, but both imports and exports have declined considerably in recent years. Denmark continues as the leading source of Netherlands imports of fresh beef, but the 1933 trade was only about one-third as large as in 1930. The smaller business in chilled and frozen beef in 1933 showed a similar relationship to the 1930 figures. Total beef imports in the last 6 months of 1933 were limited to 60 percent of the average for the last 6 months of 1932. This restriction was further reduced to 20 percent, effective January 15, 1934. The fresh beef from Denmark is handled in the Netherlands through local butcher shops. The frozen beef is largely from Argentina and goes principally into ships' stores. Argentine chilled beef is not known on Dutch markets. On the export side, 1933 figures were about 66 percent smaller than the 1932 volumes and only a fraction of the 1930 exports. The greater part of the reduced export business is done with Belgium, exports to Germany having practically disappeared. See tables, page 228.

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

FRANCE: a/ Imports of beef by countries, 1913, 1930-1932, and January - November, 1932 and 1933

Commodity and country from which imported	Year ended December 31				January-November	
	1913	1930	1931	1932 prelim.	1932	1933
FRESH AND CHILLED:	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.
Total	b/ 6,870	3,800	20,032	3,742	3,147	1,393
SALTED:						
Total	67	131	80	12	11	3
FROZEN:						
Belgium-Luxemburg		4,269	9,940	1,030	704	192
Argentina		12,857	31,889	13,324	11,830	7,384
Uruguay		25,677	28,816	24,406	20,873	14,312
Brazil		10,222	5,772	3,639	3,116	1,265
United Kingdom		4,082	8,034	2,466	2,214	15
Madagascar		7,519	10,098	13,859	c/	c/
Other countries		3,593	3,348	1,256	1,128	608
Total frozen	d/	68,219	97,897	59,980	39,865	23,776
TOTAL BEEF	6,937	72,150	118,009	63,734	43,023	25,172

Foreign Agricultural Service. Compiled from Tableau General du Commerce Extérieur, 1913 and 1930-1931; Statistique Mensuelle du Commerce Extérieur de la France, December issue, 1932, and November issue, 1933.
a/ Includes some "Other meats." b/ Includes 1,772,000 pounds of fresh. c/ If any, included in "Other countries." d/ Included with "Fresh and chilled."

GERMANY: Imports of beef, by countries, 1913, 1930-1932, and January - November, 1932 and 1933

Commodity and country from which imported	Year ended December 31				January-November	
	1913	1930 prelim.	1931 prelim.	1932 prelim.	1932	1933
FRESH: a/	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.
Belgium	557	155	35	63	b/	b/
Denmark	27,225	12,619	12,866	2,758	2,709	2,569
Netherlands	20,542	9,786	2,022	783	770	281
Lithuania	0	1,956	2,426	2,391	1,953	2,885
Other countries	18,422	757	634	346	381	232
Total	66,746	25,273	17,983	6,341	5,813	5,967
CHILLED & FROZEN c/						
Total		103,837	398	52	52	0
TOTAL BEEF	66,746	129,110	18,381	6,393	5,865	5,967

Foreign Agricultural Service. Compiled from der Auswartige Handel Deutschlands, 1913; and Monatliche Nachweise uber den auswartigen Handel Deutschlands, December issues, 1930-1932, and November issues, 1932 and 1933.
a/ Includes fresh, chilled, and frozen. b/ If any, included with "Other countries." c/ Figures for 1913 included with "Beef, fresh."

THE WORLD SITUATION IN CATTLE AND BEEF, CONT'D

NETHERLANDS: Imports of beef and veal, by countries, 1913, 1930-1932 and January-November, 1932 and 1933

Commodity and country from which imported	Year ended December 31				January-November	
	1913	1930	1931	1932	1932	1933
BEEF AND VEAL, FRESH:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Germany	65	4,748	1,090	266	243	a/
United Kingdom	4,290	22	a/	a/	a/	a/
Denmark	0	24,334	28,348	13,245	12,405	10,686
Argentina	2,929	0	a/	a/	a/	a/
Other countries	129	4	642	15	11	59
Total	7,413	29,108	30,080	13,526	12,659	10,745
BEEF AND VEAL, CHILLED OR FROZEN:						
Argentina		18,504	14,569	7,232	6,728	4,941
Other countries		2,339	1,189	340	338	57
Total	b/	20,843	15,758	7,572	7,066	4,998
BEEF, SALTED:						
Total	b/	95	94	45	42	161
TOTAL BEEF	7,413	50,046	45,932	21,143	19,767	15,904

Foreign Agricultural Service. Compiled from Statistiek van den In-,Uit-en Doorvoer 1913; Jaarstatistiek van den In-,Uit-en Doorvoer 1930-1932 and Maandstatistiek van den In-, Uit-en Doorvoer, November 1933. a/ If any, included in "other countries". b/ Not separately classified.

NETHERLANDS: Exports of beef and veal by countries, 1913, 1930-1932 and January-November, 1932 and 1933

Commodity and country to which exported	Year ended December 31				January-November	
	1913	1930	1931	1932	1932	1933
BEEF AND VEAL, FRESH:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Germany	21,876	9,097	1,773	611	611	a/
Belgium-Luxemburg	906	7,794	10,486	4,602	4,336	1,263
United Kingdom	16,597	0	a/	11	a/	a/
France	0	324	4,041	822	789	256
Other countries	949	575	38	13	24	152
Total	40,328	17,790	16,338	6,059	5,780	1,671
BEEF & VEAL, ALL OTHER b/	c/	59	71	55	53	26
TOTAL BEEF	40,328	17,849	16,409	6,114	5,833	1,697

Foreign Agricultural Service. Compiled from Statistiek van den In-,Uit-en Doorvoer, 1913; Jaarstatistiek van den In-,Uit-en Doorvoer, 1930 - 1932, and Maandstatistiek van den In-, Uit-en Doorvoer, November 1933. a/ If any, included in "Other countries" b/ This includes beef and veal, chilled or frozen, salted and dried. c/ Not separately classified.

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